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ABSTRACT

The papers in this compilation address topics relating to interlending and document supply and include the following: (1) "Training in Interlending" (D. E. K. Wijasuriya, Malaysia); (2) "Resource Collections and Document Supply Centre" (Stephney Ferguson, Jamaica); (3) "Organizing for Interlibrary Loan and Document Supply" (Rodrick S. Mabomba); (4) "The Costs of Interlending and Document Supply" (B. U. Nwafor, Nigeria); (5) "A National Library as a Center for Document Supply and Interlibrary Loan in a Developing Country" (Maria Alice Barroso, Brazil); (6) "Interlibrary Loans" (Ahmed Fassi Fihri, Morocco); and (7) "The IFLA Office for International Lending" (Graham P. Cornish, England). (SD)

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Training in Interlending

Dr. D.E.K. Wijasuriya
Director General
National Library of Malaysia

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Introduction

This paper on 'Training in Interlending', confined as it is in scope for delivery within a one hour session is clearly not intended to be used as a training session per se. The author therefore has decided to approach the topic in terms of the broader considerations attendant upon the development of an interlending and document supply system within a country and the provision of necessary training.

The paper further discusses the topic from the point of view of the developing countries. In dealing with the topic, the author has been influenced not only by information gathered while undertaking for UNESCO a survey on document delivery in the Asia Pacific region in 1986 but also by subsequent developments within Malaysia including legislative and policy provisions and the formal launching of a document delivery system for the country by the Hon. Minister of Culture in June 1988.

The term interlending as understood in this paper refers to document supply within the context of the UAP (Universal Availability of Publications) programme and covers therefore not only interlibrary lending but also the supply of copies, in whatever form, if the original cannot be made available for loan.

The term training is also interpreted broadly and is guided by the definition of the term in the Concise Oxford Dictionary viz. 'bring (person etc.) to desired state or standard of efficiency etc. by instruction and practice'.

Target Groups

In developing an interlending and document supply system (ILDSS) within a country and bringing it 'to the desired state or standard of efficiency' there is a need to identify the target groups that would merit some form of training. There are broadly 3 groups:

(1) clientele / user groups
(2) policy, management and executive level personnel in libraries
(3) personnel at the operational level

Generally the client or user groups are largely responsible for generating the demand for specific documents. Libraries attempt to respond to these demands by obtaining the documents from other sources if not available in their own library. This process of responding to user demends for specific documents could be greatly facilitated by user training which could be effected through general purpose user training courses. Many libraries however do not conduct user training courses and tend to rely on printed guides to the library. Whatever the method used, it is necessry to stress that potential users of a country's ILDSS need to:

(1) provide complete and accurate details in bibliographical terms of the desired document
(2) ensure through a search of the Library's catalogue, database or charge records that the desired document is not immediately available
(3) avoid making requests for documents if the user has borrowing priviledges in the library where the doucment is located. If the library concerned is not distantly located, it may be far more efficient for the user to move to the material than to move the material to the user. In this respect reciprocal

borrowing priviledges will help to reduce the demands made on the ILDSS. This whole issue however is debateable.

(4) adhere to ILDSS procedures / payments

(5) comply with copyright conventions if copies of the document are requested

(6) comply with rules and regulations imposed

The second group, namely the policy, management and executive level personnel in libraries possibly pose the greatest difficulties in training terms. This group tends to resist training and tends to fall back on their own perceptions of the ILDSS, based perhaps on their own experience as well as ideas acquired while in library school. This group is quite crucial as they tend to condition institutional response to the ILDSS. Institutional responses here can range very widely and would cover not only the provision of sources (personnel, finance, copying facilities, communications support) but also the willingness to make available institutional resources of books and other library material to users outside the institution's direct clientele. Taken further, it would also cover the area of bibliographical control, database creation and access, the publication of bibliographies, contribution to the national bibliographical database or union catalogue, depending on the situation in individual countries. There are also other ramifications to this and could include the development of special collections and participation in cooperative acquisition schemes for books, serials, manuscripts and other forms of material. Much of the above however would depend on budgetary allocations made by financial authorities and the proportion of resources that may be diverted to support the ILDSS as against resources that may have to be allocated to support the institution's primary objectives.

Clearly therefore the important considerations in relation to this group may not be so much a question of training in a formal sense

but the need to 'bring' a person 'to the desired state or standard of efficiency' through seminars as well as sensitizing or dialog sessions which would aim not so much to 'train' as to create awareness, to inform and obtain consensus and develop guidelines for the ILDSS acceptable to all.

The third group, namely personnel at the operational level is perhaps the most amenable to formalised training as well as on the job or in service training. This group quite often comprises of non professional or para professional staff who handle all document transactions under the ILDSS. The range of tasks, usually of a routine nature, can include document request communication, catalogue and database search, retrieval of documents, document lending, copying, packaging and despatch as well as payment, record keeping and statistics. Owing to staff shortages especially in many developing countries, many of the above tasks are performed by a single individual. In such circumstances, in service training is all that possibly could be accomplished within an institution. Many libraries mistakenly make the assumption that it is only the operational level staff that need training for the effective functioning of the ILDSS.

Centralised / Decentralised Training

Taking the above considerations into account, it would be readily appreciated that wile the training of client or user groups could best be undertaken on a decentralised basis by individual institutions, the provision of training in terms of sensitizing or dialog sessions for policy, management and executive level personnel in libraries might be more effectively undertaken on a centralised basis. For that matter operational level personnel could merit centralised training. There are many reasons for this. Perhaps the most

significant of these is the fact that the effective functioning of the ILDSS is greately dependent on cooperation and reciprocity. Centralised training can foster a proper understanding of concepts, principles and procedures, bring about consenses and facilitate the effective functioning of the system. Quite apart from this, the fact that operational level personnel in libraries participating in the ILDSS rarely number more than one or two persons, centralised training may be the most logical. This could further help to pool experience and foster the development of inter-personal links. Centralised training could usefully complement in service training within institutions, which if undertaken should be within the framework of centralised training provided.

Centralised training however implies initiatives by a central institution such as a national library or national documentation centre. In the absence of such an institution within a country, initiatives may have to be taken by the leading institution most often approached as a source of document supply within the country. This may turn out to be the major university library in the country. In providing centralised training for operational level personnel or organizing sensitizing or dialog sessions for policy, management or executive level personnel in libraries, there would be some advantage in obtaining training personnel not only from the central institution but also from some of the leading institutions participating in the system. This in turn could foster a greater sense of commitment by all concerned and minimise unease over what could be perceived as impositions from the central institution. This could be especially sensitive in countries which lack a central institution designated as such by legislation. It should be stressed however that centralised training for operational level personnel should only be organized after sensitizing or dialog sessions with policy, management and executive level personnel have been held and consenses reached on procedures and practices,

based on a proper understanding of concepts and principles as well as institutional obligations.

Centralised training may not always be feasible because of territorial expanse or other physical or communications limitations. In such circumstances, training modules may have to be developed centrally but conducted on a regional basis. To some extent this would be dependent on the dispersal of libraries within the country participating in the ILDSS.

Training Module

Moving now to the question of training proper, it is suggested that the training module for the ILDSS could incorporate the various topics discussed in this section. It is necessary to point out however that the training module is largely an excerpt of relevant sections of the Main Working Paper prepared by the author for the Seminar/Workshop on the National Availability of Publications, held in Kuala Lumpur from 15-16 July 1987. The Seminar/Workshop addressed itself wholly to the development of the ILDSS for Malaysia and represented a follow up of the survey on document delivery in the Asia Pacific region undertaken by the author for UNESCO in 1986. The Seminar could be taken to represent the sensitizing or dialog session mentioned earlier while the Workshop which followed immediately after represented the formalised training for operational level personnel also alluded to earlier. The training module discussed in this section therefore is based on actual experience within Malaysia. However while most of the sub-topics discused in this section could be incorporated in any training module on ILDSS, the taxtual content of sub-sections may have to be modified to suit individual country conditions.

1. BACKGROUND

1.1 The Universal Availability of Publications (UAP) is an on-going international programme initiated and promoted by IFLA (The International Federation of Library Associations and Institutions) and actively supported by UNESCO.

1.2 The Universal Availability of Publications (UAP) programme, first included in IFLA's Medium-Term Programme, 1975/80 is perceived as complementary to IFLA's UBC (Universal Bibliographical Control) programme which had been initiated several years earlier.

1.3 In order to facilitate the widest possible adoption and implementation of the UAP programme, an International Office for UAP was established at the British Library in 1980 and a UNESCO/IFLA International Congress on UAP was held in Paris in May 1982.

1.4 While the UAP programme, particularly the system on inter-library lending has been adopted by many institutions in the country, it operates on the basis of informal cooperation and is not widely known outside th libraries participating in the system.

1.5 There is a need therefore to create greater awareness at the national level of the UAP programme and to take effective measures to formalize a system which will facilitated the National Availability of Publications (NAP) and contribute towards the goal of universal availability.

2. CONCEPT

2.1 The UAP programme aims to improve the national and international provision and supply of publications to intending users, wherever and whenever they need it, as an essential element in economic, social, technological, educational and personal development. While the concept of UAP has considerable merit and is widely supported, priority must/be given to the National Availability of Publications (NAP).

2.2 The National Availaibility of Publications (NAP) has been conceived conceptually within the scope of the UAP programme, but places emphasis on steps taken at national level to improve the provision and supply of publications from national and international sources to intending users within the country, wherever or whenever they need it.

2.3 Within the context of NAP, special emphasis is placed on Publications Delivery System (PDS), which aims to improve primarily through libraries the provision and supply of publications from national and international sources to intending users within the country.

2.4 The term 'publications' for purposes of UAP/ NAP/PDS is defined in the broadest terms as recorded knowledge issued for public use. It includes therefore any form of printed, graphic, audio, electronic or other media, issued for public use, on or in which information is written, recorded, stored, displayed or produced, such as books, journals, newspapers,

reports, pamphlets, films, audio and video tape. The term 'publications' however excludes all confidential or restricted material.

3. IMPLICATIONS

3.1 The concept of UAP/NAP rests on the premise that each country accepts the responsibility:

3.1.1 for acquiring by legal deposit and/or other methods at least one copy of every publication produced in the country and making it available to intending users either on loan or through supply of photocopy, microcopy or other means;

3.1.2 for acquiring a significant proportion of publications produced outside the country, to meet the educational, information, research and recreational needs of the people of the country and for making these available to intending users either on loan or through supply of photocopy, microcopy or other means.

3.2 The effective realization of 3.1 itself implies that the government should provide adequate resources for the purchase of publications and a willingness on the part of institutions within a country to share their collective resources of publications and to make these available, primarily, to intending users within the country, while ensuring priority access to their primary clientele.[1]

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1. The process of making directly available to a library's own users, publications from its own holdings through loan or the supply of photocopy, microcopy or other means falls outside

3.3 The effective realisation of UAP/NAP requires the active cooperation and commitment of participating institutions.

3.4 The process of making available publications to intending users must be based on a Publications Delivery System (PDS) that does not contravene copyright conventions.

4. PRINCIPLES

4.1 Institutions participating in the PDS programme must be prepared to make available their holdings of publications and to faciliate their availability through listings in union catalogues, bibliographies and accessions lists.

4.2 Availability implies the loan of publication in their original form or the supply or delivery of such material in photocopy, microcopy or other form, in keeping with the provisions of copyright conventions.

4.3 Publications requested under the PDS programme shall be made available as speedily as possible and with minimum costs.

4.4 Costs incurred by institutions in the supply of publications shall be reimbursed and all damage or loss of material shall be indemnified.

5. LEGISLATIVE PROVISIONS

5.1 The National Library (Amendment) Act 1987 (Act 667 of 1987) makes the following provisions which relate directly to the NAP programme. Section 4(2) states that the Director General shall have among others, the following functions:

(c) to acquire and maintain a comprehensive national collection of library resoources reflecting the intellectual, literary and cultural heritage of the nation as well as a representative national collection reflecting the accumulated knowledge and wisdom of mankind;

(d) to establish within the Library —

(i) the National Depository for the storage and conservation of library resources received;

(ii) the National Bibliographic Centre for the maintenance of the national bibliographic data base and the provision of national bibliographic and documentation services;

(iii) the National Centre for Malay manuscripts for the acquisition, documentation and use of Malay manuscripts;

(e) to provide reference, information, referral, reprographic and lending services;

(f) to provide facilities within the Library to enable it to function as —

(i) the national focal point for the national information system;

(ii) the national centre for the lending and exchange of library resources in order to promote the national and universal availability of publications;

(j) to promote and facilitate national and international cooperation and resource sharing among libraries;

5.2 The Deposit of Library Materials Act, 1986 (Act 331 of 1986) makes provisions which relate to the NAP programme. Section 3(1) provides for the establishment of a National Depository which shall be the National Library of Malaysia and which shall have the following objectives:

(a) to provide for the conservation and use of library material published in Malaysia;

(b) to create standard bibliographic records of library material published in Malaysia; and

(c) to maintain statistical records of library material published in Malaysia.

5.3 The Copyright Act, 1987 (Act 10 of 1987) also makes provision which relate to the NAP programme. Part III on the nature and duration of copyright provides as follows:

13. (1) Copyright in literary, musical or artistic work, a film, or a sound recording shall be the exclusive right to control in Malaysia —

(a) the reproduction in any material form;
(b) the communication to the public;
(c) the broadcasting;
(d) the communication by cable; and
(e) the distribution to the public.

of the whole work or a substantial part thereof, either in its original or dervative form;

Provided that in respect of sound recording, the rights mentioned in (b), (c) and (d) shall not be exercised without the consent of the author of the musical work.

(2) Nothwithstanding subsection (1), the right of control under the subsection does not include the right to control —

(a) the doing of any of the acts referred to in subsection (1) *by way of fair dealing for purposes of non-profit research, private study, criticism or the reporting of current events, subject to the condition that if such use is public, it is accompanied by an acknowledgement of the title of the work and its authorship, except where the work is incidentally included in a broadcast;*

(i) any use made of a work by or under the direction or control of the Government, by the National Archives or any State Archives, by the National Library, or any State library, or by such public libraries and educational, scientific or professional institutions as the Minister may by order prescribe, where such use is in the public interest and is compatible with fair practice and the provisions of any regulations, and —

(i) no profit is derived therefrom; and

(ii) no admission fee is charged for the communication, if any, to the public of the work thus used.

6. NATIONAL POLICY

The National Policy for Library and Information Services[2] is expected to be approved by the Government in July. Several provisions within the policy document relate to the ILDSS in Malaysia and provide the policy framework set by the Government within which interlending and document supply has to be developed.

Among the many features of the policy are provisions that Library resources and facilities provided by agencies in the public sector are part of the overall national resources of the country and shall be made easily accessible to all.

Other provisions place emphasis on the acquisition and sharing of resources.

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2. The Draft National Policy for Library and Information Services was formulated by a Task Force chaired by the author and submitted to the Government for consideration in April 1988.

7. PAYMENT METHOD / RATES

7.1 An efficient payment method should be adopted in order to ensure an effective Publications Delivery System (PDS).

7.2 In order to facilitate payments under the Publications Delivery System, it is suggested that payments be made through the use of coupons. A comparison has been done on various schemes of payment currently practised and it was found that the coupon scheme is the most suitable.

7.2.1 The advantages to be gained by using coupons are as follows:-

(i) They can be bought in bulk.
(ii) They can be kept for a long period.
(iii) They can be exchanged for cash.
(iv) No issue of receipts is necessary.
(v) No record keeping is involved.
(vi) Pre-payment would have been made.
(vii) Eases payment for small or large amounts.

A study has been made on the use of coupons for payment purposes as practiced by institutions, such as Unesco, British Library Document Supply Centre (BLDSC), and the Library Association of Australia (LAA). It is recommended that the scheme as practiced by the Library Association of Australia is most suitable for implementation in Malaysia.

7.3 To simplify the Publications Delivery System it is suggested that there be uniformity in the rates of payment.

7.3.1 The advantages to be gained through uniformity are:

(i) Basis of payment is equitable.

(ii) Calculation is simplified.

(iii) Minimises accounting.

(iv) Speeds up processing and despatch of publications.

(v) Contributes towards the success of PDS.

7.3.2 Due to the fact that various institutions have their own rates of payment, an agreement to establish uniformity at this time might not be possible. However it is suggested that where possible the rates adopted by the National Library of Malaysia be used.

8. COMMUNICATIONS

8.1 Requests

8.1.1 Requests for publications should be communicated clearly and directed to the most likely source.

8.1.2 Publications requested should be cited accurately.

8.1.3 Requests may be communicated by:-

(i) Letter

(ii) PDS Request Form

(iii) Telex/Telefax

(iv) Electronic Mail

(v) Telephone

(vi) in Person

8.2 Despatch

8.2.1 Publications requested should be despatched as speedly as possible.

8.2.2 Despatch of Publications may be effected through any of the following carriers:-

(i) the Postal Service
(ii) Courier Service
(iii) Despatch Riders
(iv) Van Delivery Service
(v) Telefax

8.2.3 The choice of carrier is dependent on availability as well as on the urgency for the publications requested.

9. SUPPORT PROVISIONS

9.1 Basic support provisions for participation in PDS include the following:-

(i) Stock of PDS Request Forms
(ii) Allocation for postage

9.2 Libraries with larger or specialized resources which frequently receive requests for publications may need additional support provisions including:

(i) full-time professional/support staff to handle PDS transactions
(ii) copying equipment (photocopy/microcopy)
(iii) telecommunications support (telephone [direct line], telex,telefax)
(iv) despatch rider

10. PROCEDURES

Finally there is the necessary element of training in procedures to facilitate the smooth functioning of the

ILDSS in the country. The scope of such training could cover the following, some of which would merit detailed elaboration:

10.1 How to participate in the ILDSS
10.2 How to make a request for a specific document
10.3 Bibliographic citation for documents requested
10.4 Loan conditions/supply of copies if material not available for loan
10.5 Packing and despatch
10.6 Statistical recording
10.7 Payment

Guidelines on the operation of the ILDSS should be used as a basis of training in procedures, incorporating the above and supported by demonstration in the use of document request forms, flow charts illustrating the various operations as well as the maintenance of statistics using standard statistical recording forms and their despatch to the central agency for purposes of monotoring and dissemination of information. These Guidelines would in fact constitute a Code or Manual of Practice.

Implementation

The National Library of Malaysia functions as the Coordinating Centre for the ILDSS in Malaysia. While appropriate legislative and policy provisions have been made to facilitate the implementation of the ILDSS in Malaysia, an additional measure was taken to formalise the system through a Memorandum of Understanding which is signed by all institutions wishing to participate in the system with the National Library of Malaysia. As of June 1989, over 100 institutions

including most Universities, Federal Ministries and Departments as well as State Public Library Systems and other Statutory Bodies had signed the Memorandum, the text of which is given in Appendix A.

Appendix A

MALAYSIA

MEMORANDUM TO FACILITATE THE
NATIONAL AVAILABILITY OF PUBLICATIONS

PREAMBLE

The parties to this Memorandum recognising the importance of promoting and facilitating national and international co-operation and resource sharing among libraries and recognising the need to facilitate nation wide access to publications available within the country and abroad have agreed as follows:

Article 1

OBJECTIVE

The object of this Memorandum is to promote the national and universal availability of Publications; to facilitate nation wide access to publications and to provide a framework for achieving these objectives.

Article 2

DEFINITIONS

For the purposes of this Memorandum:

"publications" means recorded knowledge issued for public use and includes any form of printed, graphic, audio, electronic or other media, issued for public use, on or in which information is written, recorded, stored, displayed or produced; such as books, journals, newspapers, reports, pamphlets, films, audio and video tape;

"Director General" means the Director General of the National Library;

(a) to ensure the proper care and handling of any publications lent to it under the provisions of Article 3(b);

(b) to reimburse the service library for the loss of the publications or for any damage occasioned while the publications were on loan;

(c) to abide by the terms and conditions under which the publications were lent to it by the service library;

(d) to reimburse the service library for reproductions of the publications and for postage or other charges as may be agreed upon; and

(e) to ensure that the reproductions of publications are not resold for the purposes of profit making.

Article 5

CLASSIFIED MATERIALS

This Memorandum shall not apply to publications which are Classified Secret, Confidential or Restricted.

Article 6

NON-PARTICIPATING LIBRARIES OR AGENCIES

A library or agency which is not a party to this Memorandum may seek the assistance and co-operation from a service library under the terms of this Memorandum if the request is made -

(a) through the Director General, and the National Library shall be the request library for the purposes of this Memorandum; or

"National Library" means the National Library established under the National Library Act 1972;

"request library" means a library or agency which is a party to this Memorandum and which requests the assistance of a service library for information, referral, reprographic and lending services;

"service library" means a library or agency which is a party to this Memorandum and which receives a request for information, referral, reprographic and lending services.

Article 3

CO-OPERATION AND ASSISTANCE

In order to promote and facilitate national and international co-operation and resource sharing among libraries, the parties to this Memorandum hereby agree to assist request libraries by supplying copies of any of the publications which are in their collection when requested, either -

(a) by providing the publications in their original form by way of sale or otherwise; or

(b) by lending the publications for such period and on such terms and conditions as may be specified;

(c) by providing reproductions of the publications by photographic, micrographic or other processes, subject to the provisions of the law relating to Copyright, either free of charge or at such rate as may be agreed upon.

Article 4

OBLIGATIONS AND RESPONSIBILITIES

The request library shall have the following obligations and responsibilities -

(b) directly to the service library which may respond to such request at its discretion.

Article 7

AMENDMENTS

The Director General may from time to time recommend any amendments to this Memorandum by giving notice to the parties hereto and if the amendments are accepted by a two-thirds of the parties to the Memorandum such amendments shall form part of the terms of this Memorandum.

Article 8

ARBITRATION

All disputes, differences and questions which may at any time arise between the parties hereto touching or arising out of or in respect of this Memorandum shall be referred to the Director General whose decision thereon shall be final and binding.

Article 9

BREACH OF AGREEMENT

In the event of a breach of this Memorandum by a party hereto, the Director General may at his absolute discreation terminate this Memorandum with the said party and notify such termination to the remaining parties to this Memorandum.

Article 10

WITHDRAWAL

A party to this Memorandum may withdraw from this Memorandum by giving one month's notice in writing to the Director General and the Director General shall thereupon notify such withdrawal to the remaining parties to this Memorandum.

Article 11

GENERAL PROVISIONS

This Memorandum shall be binding between all the parties hereto as between themselves and as between themselves and the National Library.

The Director General shall notify all the parties hereto who are signatories to this Memorandum.

IN WITHNESS WHEREOF the undersigned, having been duly authorised, have signed this Memorandum on the dates appearing opposite their names.

Director General
National Library of Malaysia Date:

Chief Executive of Institution/Agency Date:

13. In order to facilitate the organisational arrangement for the effective functioning of Publications Delivery System (PDS) the National Library of Malaysia is designated as the PDS coordinating centre in accordance with the provisions of the National Library (Amendment) Act 1987.

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RESOURCE COLLECTIONS AND DOCUMENT SUPPLY CENTRE

PRESENTED BY

STEPHNEY FERGUSON, DIRECTOR

NATIONAL LIBRARY OF JAMAICA

AT THE

IPLA PRE-SESSION SEMINAR ON INTERLENDING & DOCUMENT SUPPLY

AUGUST 14th - 19th, 1989 -PARIS

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INTRODUCTION

Resource collections and document supply centres can be regarded as one of the cornerstones of the Universal Availability of Publications programme, UAP. The others such as bibliographic control, acquisitions including legal deposit, preservation and conservation programmes are well known, and much has been written about these. Although the lack of accommodation in libraries for the storage of little used materials surfaced at the turn of the century, and influenced the idea of cooperative resource collections, very little was attempted to address the problems at the national level in western countries.

It is true that projects on cooperative resource collections based on regional plans were drawn up, and implemented on both sides of the Atlantic, but these met with different levels of success. However certain factors such as the explosion of knowledge with the attendant exponential increase in publications, the decrease in library budgets, and the concept of UAP which is now widely accepted, have led to increased recognition that resource collections and document supply centres ought to be an important aspect of national development plans for library and information systems.

Resource collections and document supply centres are now receiving much more attention in current international library literature.
This paper looks at the subject at two levels, first in the context of developed countries, examining their achievements, successes, failures and problems. The paper secondly, addresses the subject in the context of developing countries, looking at their prospects for developing resource collections and document supply centres, at the local or national levels.

DEFINITIONS

Resource Collections

Resource collections centres exist to acquire books and publications and to store these for long periods to serve the future needs of clients. They may be at the level of one library, for example, a research library, or they may come about as a result of cooperative effort, for example, by a group of university and research libraries in a particular geographical region, or even outside of geographical boundries. They may be based on subject specialization collections built up by libraries over the years or cooperative acquisition plans which allocate certain subject areas to particular libraries. More recently, thought has been given to the development of national resource collections based on the central storage of little used material which would result in increased accommodation for the active collections of participating libraries.

Document Supply Centres

Document Supply Centres are those institutions which exist primarily to facilitate supply of material either in its original form, or as photocopies.

They may range from the fully centralized document supply centre to decentralized institutions. It should be noted however that even where attempts have been made to have centralized institutions established, these may serve as institutions of last resort, operating in conjunction with sub-regional or specialized subject/format systems. This is the case for example, in the United Kingdom where the document supply centre of the British Library Science Technology and Industry Division is well known.

Michael Hill states that the Science, Reference and Information Service of the British Library holds a near complete set of patent literature and supplies copies to clients all over the world,[1] thus paralleling the services of the document supply centre mentioned above.
In concluding these definitions, I believe that I should distinguish between the term "repositories which appears frequently in the literature and "resource collections."

Repositories

Repositories are collections of materials sent for storage elsewhere by libraries primarily to make space available in the originating library. They may be private, in that ownership of the material deposited still rests with the depositing library which exercises strict control over its use. On the other hand, they may come about as cooperative ventures where ownership is relinquished to the deposit centre. Such repositories may be passive or active. Passive in the sense that they serve merely as storage centres, rather than being actively engaged in document delivery or interlending activities.

Active repositories, however they originate, not only carry out the repository function, and ensuring that out of print copies of materials are retained, but they also serve as resource collections on which document delivery and interlending services are based. Active repositories are in fact resource collections.

For the purpose of this paper, resource collections and document supply centres are essential to each other and may be regarded as two sides of a coin, because, if the resource collection does not deliver documents, nor fulfill interlending demand, then it is merely a passive repository, and not a resource collection. I will use the two terms interchangeably, but it must be remembered that whether I refer to resource collections or document supply centres, I am essentially referring to the same facility.

PLANNING AND DEVELOPMENT OF RESOURCE COLLECTIONS

The planning and development of resource collections may come about voluntarily as a deliberate act of managers in a group of libraries, as is the case of the Centre for Research Libraries in the United States. They may also come about as a result of national planning. In western countries, it was largely influenced by the realization that libraries however rich would not be self sufficient, and it was more practical to engage in resource sharing to avoid duplication, to save space, to make better use of purchasing funds, and to achieve more effective interlending programmes. In spite of these benefits which are widely recognized some library managers still hesitate to become involved in cooperative resource collections, and the cite the following disadvantages:-

1. The great deal of effort involved in the weeding, sorting and transferring of literature for deposit in these resource collections.

2. The cost of amending library records to reflect the changes.

3. The loss of status when reduction in stock leads to smaller collections.

They also believe that the cost of operating these facilities may be too high to justify the effort especially in the light of alternatives, such as microfilming programmes or compact storage.

Whatever the preceived advantages or disadvantages, any effort to establish resource collections should first address the following:

1. Type-of facility

Should the resource collection be based on subject strength of existing libraries, or should they be set up as a separate facility?

If based on subject strength, how should these be funded to ensure continued growth? Can cooperative acquisition plans work, and where should funding come from? Should it be the responsibility of the host library?

In the event that the decision is taken to establish central resource collections, one must then address ownership of the transferred material. This a matter of great concern to many librarians who would prefer to retain ownership, and thus ensure control over their material, as they fear that publications may get lost in the interlending process. There is also concern that

if they should need the material at some future date they may not be able to recover it, as some might be discarded due to the policies on duplicates which may exist in the facility. For some, there are restrictive conditions which prohibit the transfer of material to another agency, and in others the librarians may even be held accountable for every purchase, and must face very strict auditing procedures. There is also the case where collections are presented on condition that they must remain in the library even in the event of little user demand.

2. Funding

Funding for the operation of document supply centres is another major concern. Should these be funded cooperatively, or centrally by another agency? Cooperative efforts may require cooperative funding. Can libraries devote portions of their diminishing budgets to such centres, where the management and operational costs are likely to increase as the resource collections expand?

3. Location

The matter of the site of the facility should be addressed. Where should repository collections be located? Should they be at a remote site to benefit from lower land costs, or should they be close to their client libraries, to ensure quick response to requests for material?

4. Transportation Network

Transportation is another important factor. How effecient is the transportation network? Will this be good enough to avoid delays in supplying material, or will this adversely affect the response time of document delivery?

5. Accommodation

How will the accommodation be provided? Who should provide these? Should the accommodation be purpose built, or should existing premises be adapted for use? How suitable are adapted premises for housing deposited material which must also be preserved?

6. Management of the facility

Should the management of the facility be undertaken by an independent agency? If this is the case what provisions can be made to ensure that the views of cooperating libraries are taken into account when decisions are being made? If a management

committee representing cooperating libraries operate the centre, how should decision making be done? Should it be based on one organization one vote, or should it be proportional in keeping with the size of the materials transferred?

7. Nature of the collection

Should all types of materials be accepted, or should these be based on special formats or special subject areas? Should deposited material be separated based on origin, or should they be integrated? Should resource collections serve all types of libraries, public, research, academic or even school libraries? Should duplicates be retained?

8. Evaluation of the facility

Should the facility be evaluated? What criteria should be used? How regularly should this be done, and by what mechanisms?

9. Scope of the collection

Problems may be created by users who argue that material in which they are interested should be retained however little used by others. What steps can be taken to minimize inconvenience to such clients?

The above questions have already been addressed, or are still being addressed by our counterparts in the developed world. The study on National Repository Plans and Programmes,[2] published by IFLA's International Office for UAP, gives an excellent picture of the practice in these countries.

AN OVERVIEW OF THE SITUATION IN DEVELOPED COUNTRIES

This part of the paper will therefore attempt only a brief overview of the situation in developed countries before addressing the prospects for establishing such centres in developing countries. The situation varies in developed countries. In some, although the need has been recognized, efforts are still fragmented with more success being achieved in the establishment of subject based or regional resource collections than in the establishment of national centres.

Of course the achievements are influenced by many factors such as the following:

a. The size and population of the country

Countries which cover a wide geographic area, often find it more difficult to estabish national centres. In such countries the population may be unevenly distributed, and or widely dispersed. They may therefore also opt for regional or subject based centres.

b. Historical influences

Where library traditions are strong, and where large independent libraries have developed, libraries sometimes find it difficult to give up some autonomy such as is necessary in the establishment of resource collections. The lack of a tradition of voluntary cooperation has over the years therefore partly prohibited the development of resource centres.

c. The space factor

Pressures of space created in some libraries have influenced the development of regional or subject based centres rather than the development of a central facility.

d. The nature of Governments

The type of government whether federal or state, whether centralized or decentralized, may also influence the types of centres developed. In the case of federal countries it may be exteremely difficult to arrive at consensus at the national level, but such centres may be operated at the state or provincial level. Smaller centralized countries often find it easier to develop and implement plans for national document delivery centres. In centrally directed socialist countries, resource collections are mandated by law, while in some western countries, such resource centres whether at national, regional, or subregional level may only be established by consensus.

e. Absence of planning or implementation of plans

In the absence of national plans, some libraries may initiate cooperative ventures which then develop into large resource collections; others may individually establish remote storage facilities, which then serve effectively as a resource collection. In fact the practices with regard to resource collections and document supply centres are as varied as there are developed countries.

THE PROSPECTS FOR DEVELOPING COUNTRIES

Any attempt to establish resource collections and document supply centres in countries such as ours require careful planning. Most developing countries are just beginning to set up document delivery centres. The fact that planning is taking place at this stage could mean that we may learn from the experiences of developed countries. In fact, learning from the mistakes and experiences of developed countries, may be the only advantage that developing countries have over developed countries.

Developing countries are generally characterized by the following:-

- Low levels of economic development
- Poor transportation and communication infrastructure
- Low levels of scientific and technological application
- Large populations where more than 50% may be under the age of twenty five.
- Agricultural based economies
- Low educational achievement beyond post primary
- High rate of illiteracy.
- Poor infrastucture for library and information services.

The catalogue could go on and on.

In the context of these characteristics developing countries must endeavour to transform their economies. The importance of education and its use for development must be emphasized. Basic needs such as water supplies, improved roads and communications network, health care, etc. compete for scarce resources with educational information needs. It is therefore incumbent on the information professionals in societies such as ours to maximize the use of the limited resources available to ensure availability of and accessibility to information which are important pre-requisites for development.

National planning for libraries and information systems is being promoted by Unesco, and is increasingly gaining acceptance in developing countries. The opportunity should be taken therefore to include resource sharing as part of these plans.

Several options for developing resource collections exist. The UAP document on National Repository Plans and Programmes describes five models.[3] A study of these should provide guidance for the development of such plans.

MODELS FOR RESOURCE COLLECTIONS AND DOCUMENT SUPPLY CENTRES

The following is a brief description of each model.

Model A

Model A is a centralized separately administered facility covering a single country where all libraries would send little used material in keeping with pre-determined criteria. Such a facility would provide optimum conditions for storage, security, and preservation of material. It was suggested that this model may be more appropriate for developing countries where resources are limited and not well organized, and where adaptation of this model may be easier in the absence of long established library traditions.

Model B

Model B is more flexible. Although separately administered as a centalized facility it provides more freedom in the criteria for guidance of the material selected for deposit. It also provides for the retention of ownership of the materials sent to the centre. It was suggested that Model B would be particularly suitable for small to medium sized developed countries with non-federal political structures.

Model C

Model C provides for a decentralized but coordinated national network of regional and local repositories, which would handle all types of materials within pre-determined geographical areas.

Model D

Model D is a variation on Model C allowing for looser control of the system with voluntary transfer of materials. It would have a management committee to provide the necessary coordination. This model would allow for greater variations in standards for the retrieval and supply of items. Model D was seen as being most suitable for medium and large developed countries particularly those with little state intervention where libraries are grouped in urban centres, where distances between these centres are considerable, and where postal services are not good.

Model E

Model E is the most flexible of all, it would distribute the resource centre functions among several existing libraries which would have responsibility for retaining items within pre-determined categories. This model assumes the sharing out of responsibilities in an equitable and acceptable manner to the participating libraries. No additional financial resource would be required.

THE RELEVANCE OF THESE MODELS FOR DEVELOPING COUNTRIES

Of the models proposed the following seem to be most appropriate for developing countries.

Model A which is a centralized separately administered facility. Decision to use such a model should be influenced by the geographic area to be covered, and the state of the communications and transportation network. In order to ensure quick delivery of requests and early response to these, the availability of suitable personnel to manage and operate the facility is also of importance. The provision of funds to establish and operate such a centre may be difficult to come by especially in the light of competing demands from other sectors of the economy. However, in view of the benefits to be obtained from establishing such a national resource collection, vigourous efforts should be made to persuade governments to provide such funding. In the event that a survey of library facilities reveals that there already exists a library which is sufficiently strong in resources, this may be adapted for development into a national resource collection.

In my opinion Model A would be most suitable for small developing countries. Governments of such countries should therefore be lobbied and be persuaded to provide the necessary funding to establish such a national centre.

The economies of scale to be achieved, the benefits from resource sharing, the opportunity for by-products such as a clearing house for duplicates and disposal of materials, the possibility for coordinating acquisitions plans as well as for monitoring existing or planned legal deposit legislation should be recognized.

Model C presents another possiblility, it seems more appropriate for countries which cover large geographic areas where urban centres are distributed in various regions, as is the case in Nigeria. Regional resource collections could be based on that of an existing library. This would have the advantage of not only meeting regional needs because the transportation network would naturally be focused on these urban centres, but it could also serve to influence the development of library systems within the region. The facility may be operated as a separate regional centre or it may be based at an existing library possibly providing yet another advantage of accelerating the development of that library.

Model E the distributed decentralized type of facility, is also of some relevance to developing countries. In the event of failure on the part of Government to establish national or regional resource collections, centres, this model may be a last resort. Local libraries with strengths in certain subject areas could be identified and persuaded to make their collections available to facilitate resource sharing with the company.

Other possibilities

If resource collections cannot be developed either through voluntary cooperation or national planning, libraries should ensure that facilities for collecting and preserving their own publications are developed. This would at least facilitate document supply services for their own publications for which they should assume responsibility. Legal deposit legislation and the establishment of a national collection should therefore be identified as a priority. The concept of networks on which a cooperative acquisitions scheme could be based should also be explored. Such networks, when grouped by subject areas, could develop informal acquisitions programmes, within the context of their limited resources. This could, with the development of appropriate policy guidelines, achieve some degree of resource sharing.

EXTERNAL SOURCES

External sources of document supply may have to be used, but they should be seen as last resorts. The cost of the service is high when this is translated into local currencies, and makes this type of service virtually prohibitive . Even though external sources can respond with speed, quite often much quicker than internal sources, countries should not rely on these exclusively at the expense of trying to develop their own internal sources. The British Library Document Supply Centre in the United Kingdom, the National Technical Information Service in the United States and other large research libraries or document supply centres such as the Commonwealth Agricultural Bureaux, are well known facilities in developing countries, and are used by many. However, these services should be used only when the need is urgent.

THE WAY FORWARD

Library professionals in developing countries must take the initiative to influence the development of resource sharing facilities within our own countries. We should use our professional associations where these exist to change attitudes and to promote the concept of resource sharing.

As a first step we should undertake surveys with a view to publishing guides or directories however simple which will identify the strengths of existing collections. We must accept responsibility for the acquisition and preservation of our own national publications which can serve as resource collections, not only for the libraries within our boundaries but also to facilitate international interlending as a quid pro quo for the services we receive from external sources. We must use

all avenues open to us to impress our governments that information is an important resource which can contribute to the social and economic development of our coutries. We must find effective methods to demonstrate that sharing information resources can only result in savings for the country, and lead to wider availability of inforamtion sources, and improved access to this information.

In closing I must acknowledge the value of the publication National Repository Plans and Programmes: a Comparative Study of Existing Plans and Possible Models[4] issued by IFLA's International Office for UAP. I have drawn on it extensively in the preparation of this paper, and recommend it as essential reading before any attempt is made to plan resource collections or document supply centres.

NOTES

1. "Universal Availability of Patents" by Michael Hill IN Interlending and Document Supply, 16 (3), 1988, 89-94

2. National repository plans and programmes:a comparative study of existing plans and possible Models (by) Capital Planning Information. Wetherby (England): IFLA International Office UAP, 1982

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IFLA Pre Seminar on Interlending and Document Supply

Country Paper

An Overview of the situation in Jamaica

Prepared by: Stephney Ferguson - Director

National Library of Jamaica

A. INTRODUCTION

Jamaica is a small Caribbean island of approximately 4,244 square miles. It is the largest and most northerly of the English-speaking islands but its proximity to Florida, USA, has resulted in a trade and travel pattern more oriented to the United States than to its sister islands in the South and Eastern Caribbean. Nevertheless economic and cultural links are maintained through the Caribbean Community (CARICOM) as the transportation infrastructure between CARICOM territories improve and the integration movement grows stronger. Language and political differences have provided effective barriers to closer interaction with its neighbours Cuba and Puerto Rico.

B. THE NATIONAL INFORMATION SYSTEM

The National Information System of Jamaica is structured on a system of networks - See Diagram attached as Figure I - Interlending in Jamaica takes place at 2 levels - the national and the international. At the national level, interlending is based on the networks.

Interlending operates in parallel based on the Public Library Network, the Jamaica Library Service, the University Libraries Network and the National Library Network.

B1. THE PUBLIC LIBRARY NETWORK

The Jamaica Library Service Network (the public library system) is administered by the Headquarters of the Jamaica Library Service which is divided into 5 geographic regions. National interlending requests are processed first at the local regional level within the Public Library System. When this source is exhausted the request is sent to the Headquarters where contacts are made with the other regions in an effort to satisfy requests.

International interlending requests are processed at the Headquarters and the records show that in 1986/87 no requests were dispatched and 21 were received. 7 were satisfied by photocopies.

B2. THE UNIVERSITY NETWORK

Within the University Libraries Network there is interlending between the main and departmental libraries on the campus as well as at the national level but there are no figures available. More often than

collection in the branch and departmental libraries rather than moving the books around since the campus at Mona in Jamaica is fairly compact and buildings and departments are easily accessible. Even outside of the university community clients can obtain special permission to use material.

There is significant regional interlending between the three campuses of the University located in Barbados, Trinidad/Tobago and Jamaica. These islands are separated by relatively great distances and transportation between them is by commercial air transport only. In very urgent cases international interlending requests are done by telefax or through UWIDITE, the university satellite communication system which links the three campuses as well as the University Extra Mural Centres on the other islands. International interlending is also carried out with BBLSDOC and with various universities in the USA. Between the islands document delivery is usually by "courier" informally, that is, using persons who travel between the campuses on University business - International Courier Service and Commercial Airlines Small Package Delivery Services are used in cases of extreme urgency. International interlending figures from the Mona Campus show that 194 items were loaned and 119 borrowed during 1986/87.

Those loans were directed as follows:

Place received		Place Dispatched	
USA	57.14 %	USA	24.22 %
BRITAIN	33.61%	BRITAIN	15.46%
BARBADOS	5.88 %	BARBADOS	48.45%
TRINIDAD	3.36 %	WEST GERMANY	10.30 %

The University at Mona is therefore a Net Lender of books.

B3. THE NATIONAL LIBRARY'S NETWORK - NATIONAL INTERLENDING

This network includes sub-networks of special private and government libraries grouped into sectors by subjects. The National Library offers a Referral Service based on the profiles of libraries in its network and is therefore able to locate items requested and directs client libraries and individuals to the sources. More often than not the document is made available to the client in the host library and there is relatively little interlending because 95% of the special libraries are located within the Kingston Metropolitan area. The National Library keeps statistics indicating the number of referrals successfully made but there are no statistical studies based on reports from the libraries involved. In 1986-87, 256 requests were received of which 214 referrals were successful.

In addition, libraries may make direct contacts with each other as they use the **Directory of Libraries** and the **Union List of Serials** in

the degree of interlending which is taking place within the country.

B3.1 INTERNATIONAL INTERLENDING WITHIN THE NATIONAL LIBRARY'S NETWORK

The National Library being responsible for the collection and preservation of Jamaican publications is a research and reference library only. Material is never sent on loan. Instead photocopies or microfilm copies are made available when they do not breach copyright agreements. The National Library will direct international interlending requests to other libraries when it cannot supply as it sees itself as the library of last resort for Jamaican and West Indian material.

It receives approximately 15 requests annually and is usually able to satisfy the majority of these. In 1986/87 it received 12 requests and was able to satisfy 10 of them.

It should be noted that International and National Interlending within the national information system is not very highly centralized and libraries may conduct their own activities only turning to the National Library as a last resort. Consequently the Scientific Research Council's Library, the focal point of the Science and Technical Information Network maintains very active relationship with NTIS in the USA.

The library and the Documentation Centre of the Planning Institute of Jamaica maintains close and direct link with the Economic Commission for Latin America and the Caribbean's (ECLAC) CARISPLAN focal point in Trinidad and Tobago.

By and large, Jamaica is a net supplier of materials in the area of International Interlending.

BIBLIOGRAPHIC TOOLS

C1. DIRECTORY

The National Council on Libraries, Archives and Documentation Services (NACOLADS) has recently published the 2nd edition of a directory of libraries in the island. This publication helps libraries to identify sources of information for national interlending or client access.

C2. UNION LIST OF SERIALS

The National Library of Jamaica in cooperation with its network members has compiled and published a computer produced a union list of serials containing 5,536 items. The same has been done by the main library at the University for the University Network and the Jamaica Library Service Headquarters maintains a location list of the periodicals within its system.

C3. NATIONAL BIBLIOGRAPHIC DATA BASE

The National Library of Jamaica is responsible for creating a National Bibliographic Data Base of the collections within its network. As a first step an automated data base of national imprints is being developed and this currently lists 1,200 items beginning with items published since 1975. Retrospective conversion will be attempted at a later date. The decision on the compilation of a full data base of all holdings national or international has been deferred.

C4. NATIONAL BIBLIOGRAPHY

This is published quarterly with annual cumulations. It follows international standards but as happens quite often in many countries it is not up to date.

C5. CATALOGUES

There is a published catalogue of the holdings of the National Library of Jamaica covering the period since the collection started to 1975. The Jamaica Library Service maintains a Union Catalogue on cards of the holdings of the libraries within its system and such a catalogue also exists for the main libraries of the University's system.

C6. NATIONAL REFERRAL SERVICE

A National Referral Service based on detailed subject profiles of participating libraries is operated by the National Library. This assists in identifying sources of information for client libraries.

D. RESOURCE COLLECTIONS

The National Library is the Resource Collection for local publications, it possesses a comprehensive collection dating back to 1879.

The Library and Documentation Centre focal point of the Socio-Economic Network and the Technical Information Section of the Scientific Research Council, focal point of the Science and Technical Information Network operate as resource collections in their subject areas as well. There is no planned co-operative acquisition programmes. The focal point of the Socio-Economic Information Network is the local focal point for the CARISPLAN Data Base. The Scientific Research Council is the focal point for the Caribbean Energy Information System.

E. STATISTICS

This is maintained individually by the networks and although the machinery exists for reporting on this annually to the national co-ordinating body, National Council on Libraries, Archives and Documentation Sefvices (NACOLADS) this is not being done.

F. TRAINING FOR INTERLENDING

There is no specific training programme for interlending.

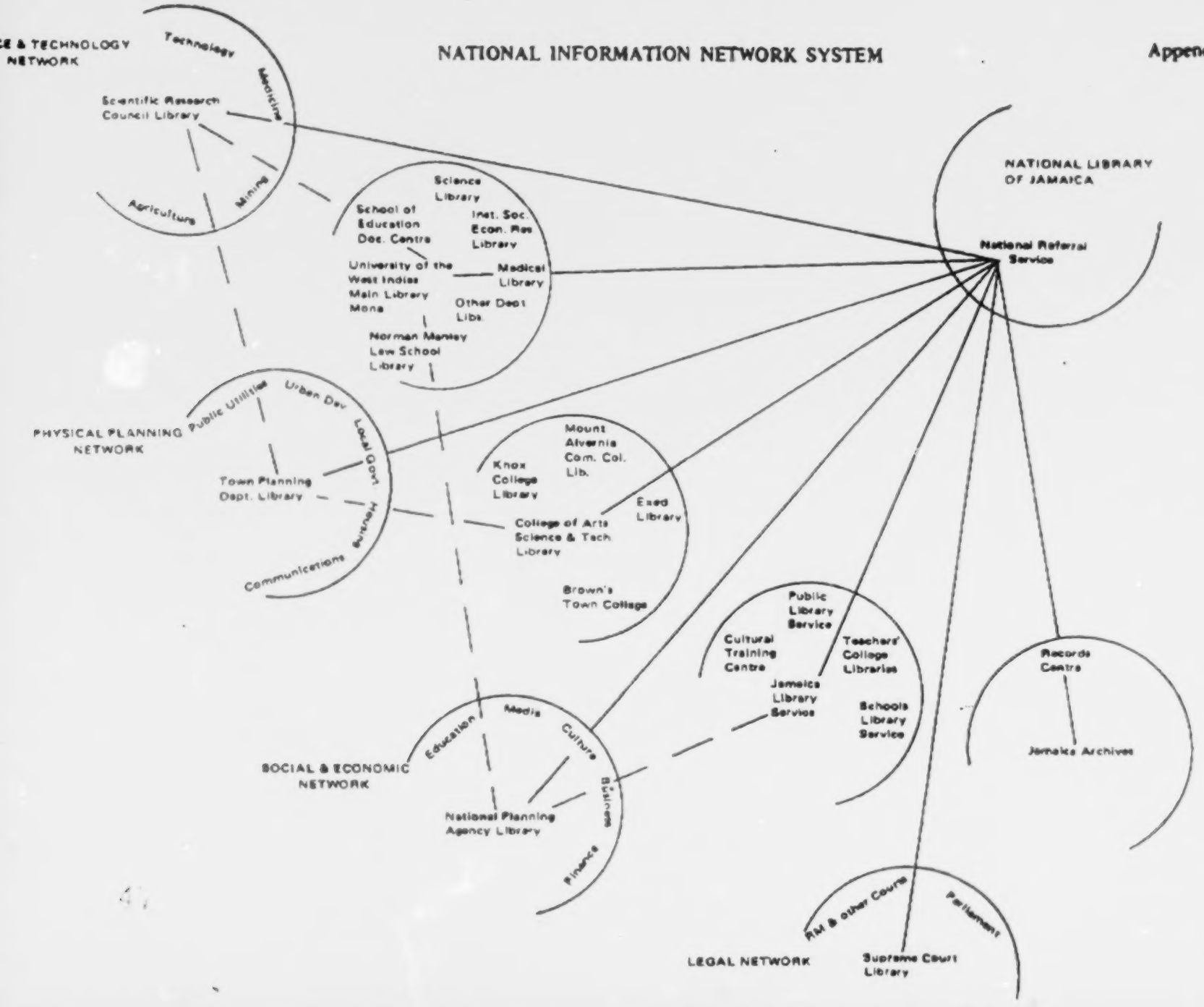
G. TECHNOLOGY AND COMMUNICATIONS

Communication of interlending requests is done by mail, telephone, telex in rare cases and by telefax. Supply is usually by mail or by courier service if the urgency justifies it. Costs for courier services are recovered.

Documents may be supplied as original photocopies or microfilm depending on the source of supply and the value attached to the publication.

NATIONAL INFORMATION NETWORK SYSTEM

Appendix I



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ORGANIZING FOR INTERLIBRARY LOAN AND DOCUMENT SUPPLY

Paper prepared for the IFLA Pre-Session Seminar on Interlending and Document Supply, Paris, 14-19 August 1989.

By
Rodrick S. Mabomba

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page 15 follows.

1. INTRODUCTION

This paper attempts to cover the topic 'organizing for interlending and document supply', one of the selected seven themes on various aspects of interlending and document supply (I D S), the subject of this IFLA Pre-Session Seminar. Coming, as I do, from a Third World environment where I D S exists in an unorganized and informal state, most of the views which I have expressed in this paper are not based on personal experience or observation, but on theories expressed by others, mainly in the developed world, some of which have been tried. There is more of 'what could be done, or ought to be done' than what has been done and how it has been done.

Interlending and document supply has been on the increase everywhere in recent years. Among other factors, the literature explosion, multiplicity of formats, domestic disorganization of resources, currency devaluations, reductions in book votes and unprecedented escalation of book prices and journal subscriptions have made self-sufficiency in libraries impossible. Libraries find themselves increasingly unable to make available from their own resources materials required by their users. So they resort to borrowing or seeking photo/microcopies from other libraries or document suppliers.

Developments in computer and telecommunications technology have further facilitated I D S transactions. Bibliographic data bases have been established and are accessible by customers everywhere, telecommunications facilities permitting. Others have been put on compact disks thereby enabling independent access. These data bases facilitate identification of required documents. Computerized union catalogues facilitate location of the documents. Suppliers of required documents, such as AGRIS, Chemical Document Delivery Service, the Online Computer Library Center, the Document

who can afford the cost of the services. Telex, telefacsimile, and express courier services such as T N T Mailfast and D H L International Courier Express have enabled speedy delivery or transmission of documents at both national and international levels.

The volume of I D S traffic has rendered systems based on informal, gentlemen's agreements not only inadequate, time-wasting and frustrating, but also very uneconomic and inefficient. Formal, properly organized systems have gradually flourished, often along lines designed to meet sectoral/subject interests or national needs. The patterns of organization have varied from country to country, ranging from total centralization to total unplanned decentralization, the latter often reflecting an unorganized state of affairs. What is involved in organizing for I D S ? What are the possible patterns of organization for I D S at national level ?

2. GENERAL REQUIREMENTS

For I D S to thrive within a country, there must be libraries with the financial resources to acquire/collect and process documents, and organize their systematic retention for both current and future use. Tools must exist to enable identification and location of required documents. There must be reliable equipment for document reproduction or copying. There must be libraries with reliable resources and librarians who are willing to cooperate and share resources, and who can afford to assign special staff for the tasks involved. There must be reliable speedy transport, postal (surface and air) or telecommunication systems for conveying/ transmitting requests and documents. Borrowers or recipients of documents must not only be willing but must also be able to pay for costs of the transactions in a manner acceptable to the lender or suppliers. Above all, there must be a recognized central machinery to administer or to be responsible for the handling of requests and the supply of required documents speedily, within a properly structured national system, with clear, simple messaging/delivery procedures, and based on clear policy guidelines.

a. **Administrative Machinery :** There must be recognized leadership for national I D S matters. Such leadership could be based in the national library or in any other library or relevant centre of national standing. It will be the national focal point for I D S services. This leading institution will be responsible for matters relating to policy, plans and agreements for national, regional, local and special networks; the establishment of hierarchies for routing requests and the identification of sources of first or last resort; schemes for compensation and charging; interlending standards and messaging protocols; compilation of statistics, and the production of interlending codes, manuals and network directories. [1]

IFLA has indeed suggested that each country should have a Centre which will play an active role in international lending, and has given the following functions for such a Centre :

i) to perform a coordinating role for national interlending;

ii) to act as the main national centre for the supervision and construction of union catalogues and their maintenance;

iii) to have direct access to significant library collections in its own country;

iv) to provide an information service on interlending;

v) to have responsibility for planning, developing and supervising an efficient national system of interlending where this function is not adequately performed by another agency;

vi) to act as a centre for the receipt of requests from abroad and their transmission onward to libraries within its own country when direct access to collections is not possible or accepted;

vii) to act as a centre for the transmission of requests to foreign countries from libraries within its own country when direct access is not possible or not accepted;

viii) to provide, where necessary, bibliographical support and expertise to ensure that requests sent abroad reach the required standards. [2]

Among other responsibilities could be those relating to the adoption of new technology and liaison with other national agencies, e.g. postal and telecommunications authorities, computer societies, etc.,

and handling legal or copyright implications of document copying or reproduction in the course of I D S. The Centre could also handle cases such as those of library authorities who hold their librarians responsible for the loss of documents while on loan to other libraries. It could be responsible for staff training, monitoring the I D S system, and assessing the level of its performance with regard to rate of satisfaction of requests, speed in supplying documents and magnitude of cost in achieving such satisfaction rate and speed.

b. **Policy on I D S:** National policies and plans on library and information services should include I D S.

Though national policies on library and information services are rare, and the development of I D S has in most cases been unplanned and evolutionary, it is important to have some kind of policy which will guide I D S planners, organizers and operators. The main policy objective will be to ensure and facilitate planned acquisitions and collection development, speedy access to documents available in any library within the country by anyone needing those documents, and that where national resources cannot satisfy local needs, machinery should exist for tapping appropriate external resources, all at the lowest cost possible. An awareness of IFLA's Principles of International Lending will be useful in this regard:

i) Every country should accept responsibility for supplying to any other country, by loan or photocopy, copies of its own publications, certainly those published from the present date, and as far as possible retrospectively. This responsibility may be discharged in various ways, among which national loan/photocopy collections appear to have particular advantages.

ii) Each country should have a national centre or centres to coordinate international lending activity for both incoming and outgoing requests. Such centres should be closely linked with, if not part of, the national library where there is one.

iii) Each country should aim to develop an efficient national lending system, since national lending systems are the essential infrastructure of international lending.

iv) As far as possible, photocopies or microfilms should be supplied in the place of loans of original copies.

v) Fast methods should be used for supplying and returning items. Airmail should be used whenever possible.

vi) All requests should be dealt with expeditiously, having regard to accuracy, at all points: the requesting library, any intermediary used and the source library.

vii) Standard and simple procedures should be developed and adopted, particularly procedures for requesting items and for claiming any payment.[3]

The issue of policy for I D S is important not only at institutional or national levels but also at regional or international levels. Towards this end, the International Congress on U A P held here in Paris in May 1982, recommended:

"Member States which have no national interlending policies should consider their establishment as one of the essential means of improving availability. Pilot projects should be set up with international and other assistance for the establishment of national interlending systems which would serve as models for others where no such systems exist.

"Where conditions are appropriate, feasibility studies should be undertaken, with the support of Unesco and other relevant organizations, of the possibility of developing regional (multinational) interlending policies and systems."[4]

c. **Acquisition and Systematic Retention of Documents:** Interlending and Document Supply presupposes the existence of documents: someone having acquired the documents and making them available for lending, or for reproduction and supply.

Organizing I D S will therefore involve the identification or designation of a library or libraries which will be responsible for the acquisition and systematic retention of documents, local or foreign, for the benefit of national and international I D S services.

Closely connected with a national I D S policy is a national acquisitions policy, an effective means of ensuring the availability, for interlending, of suitable local and foreign publications.

"The policy creates the programme through which the published material held in a nation's libraries, archives and documentation centres is gathered and controlled in order to be made available. It prescribes formally the organised collection of resources intended for the nation's use and beyond. The policy may indicate the categories of material to be acquired or those that will not be acquired."[5]

The documents will be organized and stored in a manner to facilitate speedy retrieval.

d. **Identification and Location of Documents:** When a specific document is required, tools must exist to enable the bibliographic identification of the document, and then to locate it wherever it may be held. There will be need to have union catalogues, union lists of journals, catalogues of specialized libraries or those libraries with significant holdings in a special field depending on the pattern of organization for the I D S services.

e. **Telecommunication Facilities:** Telephones will be useful in messaging, including the use of the telephone lines for electronic mail and online systems. Telex will be useful in both messaging and transmission of short documents. Telefacsimile facilities will also enhance

messaging and document transmission processes. For the future, Western Europe is looking forward to the success of the Apollo Project, an experimental satellite-based system for document transmission, whereby Receive Only Earth Stations at users' premises are to be used in the high speed digital transmission of documents from a central store.

f. **Computer Facilities:** Particularly where online communication is possible, computers will expedite messaging, identification and location of documents by enabling direct access to bibliographic or full-text data bases—local or foreign. Subscriptions to data bases on CD-ROM and possession of requisite equipment will obviate the need for the expensive online access to distant data bases.

g. **Document Reproduction Facilities:** These are crucial in I D S services. Reliable photocopying machines and paper supplies must be available. Microfilming or fiching facilities are also essential in some cases.

In organizing an I D S system in a country, it should be ensured that the identified or designated supplier institution(s) have these facilities.

h. **Postal Facilities:** Efficient, speedy postal services, by surface or air, will benefit the transmission of I D S messages as well as the delivery of documents between lender/supplier and borrower/recipient institutions. A good road transport network is necessary for efficient surface post services.

i. **Staffing:** Libraries involved in I D S should have special staff working, as far as possible, in a special I D S Section. In most Third World libraries, I D S transactions are handled by ordinary lending library or counter staff who have a horde of other tasks to carry out. When there is no special I D S Section, priority will obviously be given to satisfying requests made by a waiting reader.

I D S personnel must be conversant with national and international I D S procedures, and must be accurate in executing their tasks. They should be sympathetic to the invisible borrower at the other end, as well as being empathetic. Staffing for I D S is of such importance that it is one of the seven themes at this Seminar.

j. **Paying for I D S:** There are always costs involved in I D S services, from the dispatch or transmission of a request to the receipt of a requested document. Unless such costs are borne by the state, e.g. for I D S within the country, some form of compensation for the costs incurred by the supplier or lender should be established when organizing I D S services. 'Cost recovery for international lending gives an incentive to improve national systems to an economic level, and to supply documents quickly and willingly'.[6]

Maurice Line has also pointed out that any self-respecting inter-lending system should be self-financing, designed in a manner that the supplying libraries recover their costs.[7]

It has been noted that inefficient procedures, inadequate or inaccurate information on request forms, use of a wide variety of interloan forms, multiplicity of potential sources of supply, messaging and document delivery methods used, and the methods of cost recovery used are among the factors which do contribute to the magnitude of I D S costs. Simplicity, uniformity and coordination will reduce such costs.

3. MODELS FOR I D S SYSTEMS

This topic has been ably covered by Line, Briquet de Lemos, Vickers and Smith in the Unesco document 'National interlending systems: a comparative study of existing systems and possible models' (1980), and by Vickers and Line in the U A P Programme document 'Improving the availability of publications: a comparative assessment of model national systems' (1984). A comprehensive study was presented by Hope Clement at the International Conference on Interlending and Document Supply, held in London in November 1988, in her paper 'National and international models for interlending', which I referred to earlier in this paper.

I would refer those who wish a detailed exposition of I D S models to these three papers. Here, it will suffice to give a summary of the factors which will affect, dictate or influence the choice of a particular model; and indicate the types of models which have been identified (using Hope Clements's categorization), with the advantages and disadvantages which are associated with each model.

Within a country, I D S may be organized as one national system, or there may be several regional systems. Systems may be based on type of library, e.g. a public library I D S system or an academic library I D S system. It may also be possible in some cases to base on I D S system on subjects or languages.

a. Factors affecting the choice of models

Several factors, mostly unconnected with libraries, have been identified as affecting the choice of a national I D S model. They include:

i) Geography: Size of the country and topography - mountainous, desert, group of islands, etc.

ii) Population: Size, density and distribution, ethnic composition and multilingualism. Urban and rural population ratios.

iii) Political organization: Degree of central planning; constitutional regulations on centralization or decentralization of services; and local autonomy, particularly in federal governments.

iv) Economic systems: Planning, governing and funding of libraries may vary between socialist and capitalist systems. The role of the private sector may also be crucial.

v) Technological penetration: Type and level; the extent to which information technology has been adopted.

vi) History and state of library development: To develop from scratch or base on what already exists.

vii) Existing level of resource-sharing consciousness and appreciation among librarians.

viii) Stage and nature of national development as well as the stage and nature of development in education and research- elements influencing levels of demand in I D S.

ix) Local book production levels. The proportion of documents available from local resources and foreign sources.

x) Legal provisions for copyright.

This means that the conditions and needs to which a national system must be designed to respond will vary from country to country. The implication here is that no model will be perfect for any particular country. Composite models might be the solution.

b. **First Model:** A centralized single lending collection; a dedicated centralized collection or service, built specifically for interlending purposes. Among the advantages indicated for this model are:

i) It is economical to use by libraries; offers a single first.

ii) Direct costs of handling requests are low.

iii) It can be organized specifically for interlending, that requires fast retrieval and supply of documents.

iv) Performance can be easily monitored, and hence facilitate matching provision with demand.

v) It facilitates provision of national imprints and marginal material.

vi) It can give a good service if adequately funded.

vii) It relieves individual libraries of the interlending burden and can take advantage of economies of scale.

viii) It obviates the need for costly union catalogues.

Among the disadvantages indicated for this system are:

i) The cost of establishment and maintenance is high. Unit costs will be high unless demand is heavy.

ii) There is a risk of damage to the collection. It puts all eggs in one basket.

iii) Inadequate funding and staffing would result in poor services.

iv) By not exploiting existing library collections in the country, it can lead to unnecessary duplication of resources. This may be an extravagance in environments where telecomputing facilities now enable efficient communication between libraries.

v) It seemingly does not work very well for supplying monographs.

vi) It rules out local choice and may be unacceptable in some political environments.

vii) It may unleash unnecessary demand from less serious borrowers.

c. **Second Model:** A central lending collection, with back-up referral libraries. Demand will be concentrated on a few libraries holding a high proportion of titles in the country, led and coordinated by the central collection authority.

The advantages and disadvantages of this model are indicated to be the same, albeit less extreme, as those of the first model. It is most effective if the back-up libraries are selected on the basis of strength of holdings in specified subject areas. In this model union catalogue needs are minimal, and it makes use of other major resources in the country.

d. **Third Model:** A national lending centre, as distinct from collection, responsible for national coordination; production and maintenance of union catalogues and lists; provision of location service and referral service to identified resource libraries, and functioning as the focal point for international lending.

Among the advantages for this model are that it is less expensive than a central collection; it facilitates exploitation of resources which are available in the country; it provides for national coordination; it provides location tools and services, and facilitates sharing of the interlending burden within a country.

Among the disadvantages of this model are problems relating to union catalogues (which it heavily relies on), some of which may be alleviated by computerization; monitoring to ensure that provision matches demand is difficult; coordination may be difficult if there is no central funding source or payment system to net lenders; it may be difficult to provide items in low or high demand, and supply may be slow because the first duty of the participating libraries is to serve the clientele for which they were established. The advantages and disadvantages of this model are similar to those for the 'Unplanned Decentralization' model described in the U A P document 'Summary of research of the U A P Programme' referred to above.

e. Fourth and Fifth Models: These are both based on exisiting interlending networks. In one the networks are coordinated (a network of networks) and in the other they operate independently.

The networks may be by type of library, region, jurisdiction, or by language.

The network of networks, apart from giving a high level of developmental and operational autonomy to individual networks, is good for regional supply and maximizes the exploitation of existing systems and resources.

Efficiency of this model will, however, depend on that of the constituent networks or systems. Coordination of the systems could be expensive. Standardization and provision of location tools and services will be difficult. A high level of telecommunication and computer technology is essential for effectiveness.

Where the networks are uncoordinated, they can be designed to suit specific needs and they enjoy greater autonomy than when they are linked. They may also develop their own back-up resources. However, lack of coordination at national level is a drawback, as is the absence of overall location tools or referral mechanisms among the networks.

f. **Sixth Model:** This is characterized by total decentralization, whereby libraries borrow or lend on a bilateral basis. There is no national coordination machinery, and location tools and services do not exist.

Though it enables autonomy for each library, achieving a loan will be time consuming and expensive. There will be a significant scale of unnecessary duplication of resources, and leadership or a focal point for international transactions will be nonexistent. It may be difficult to cultivate a resource-sharing consciousness among the institutions, and no one will feel obliged to lend. Requests, and therefore the lending burden, will converge on the larger libraries in the country.

Though Hope Clement says this model is 'not really desirable' for any country, it actually does 'exist' in many Third World environments, not by design or desire, but because there is no model of any kind!

In conclusion it has to be reiterated that in selecting national I D S models, neither total centralization nor total decentralization will be viable, as pointed out by Hope Clement, "Between these two, there is an infinite variety of mixes and matches, or of hybrid or composite models varying from strong central services and collections to minor central coordination, and from a model composed of a central focal point and individual libraries to a model based on networks with a focal point or a network with subnetworks."[8]

It was noted by the 1982 U A P Congress that the optimal solution in most countries will l i e in a balance between concentration (or centralization) and decentralization. The best balance would depend on local circumstances, especially on the volume of demand.

suggests that "the smaller and more compact geographically, culturally and jurisdictionally a country is, the more likely it is to choose a solution (model) on the centralized side, and the larger, more spread out, segmented and diverse a country is, the more the model will need to carry strong elements of decentralization."[9]

4. ORGANIZING FOR INTERNATIONAL LENDING

We have to refer to the IFLA Principle concerning the need for each country to develop an efficient national lending system, as a prerequisite and essential infrastructure of international lending.
International I D S will more or less have the same general requirements as national systems: documents must be available in the countries, location tools and services must exist and speedy supply/delivery systems should be available - all at the minimum cost possible.

International I D S should ideally be exhaustive, capable of supplying any published document. It should not be regarded as a substitute, but a supplement to national systems. Towards this end, national systems should ensure that local sources of supply are exhausted before resorting to international borrowing.

The U A P Congress noted that while the planning and implementation within each country of a national interlending system are feasible and necessary, worldwide planning for international availability was unrealistic because any designed theoretical system would depend on action by numerous individual countries to implement.

Nevertheless, several patterns of I D S transactions among countries have been identified:

a. National centres may conduct interloans using requests channelled through them by libraries in their respective countries

b. Groups of countries may make formal or informal IDS arrangements among themselves. The grouping could be by geographical proximity (e.g. Eastern, Central and Southern Africa); by language (e.g. francophone Africa); by cultural or traditional ties (e.g. Arab States); or by historic ties (e.g. sharing one colonial master, which also involves language similarities). Other groups may be based on economic unions (e.g. SADOC).

c. International IDS can also be arranged between subject oriented libraries in one country and those in another. It may involve various subject network coordinating centres in one country collaborating with their counterparts abroad in IDS.

d. Another pattern of international IDS is the direct use of major sources of international supply by libraries from various countries. Some such sources have been established as national supply centres but with a capacity to handle foreign requests, e.g. the BLDSC in England and the Centre de Prêt in Paris here. Others have been established by international organizations, e.g. FAO's AGRIS document supply service.

These patterns have not been designed by anyone. They have evolved over a number of decades. It may be possible to identify from them what could be done if a country or countries wished to formalize international IDS services.

5. CONCLUSION

The fact that economic and other factors have made self sufficiency impossible in meeting the needs of document seekers at local or national levels means that interlending will continue to grow in intensity and diversity at both national and international levels. Bilateral and gentlemen's agreements are becoming inadequate and properly organised IDS services must be established. There are

policy, administrative, technical/infrastructural, human resource and finincial requirements in organising for I D S at local, national and international levels. Various models are available to guide I D S planners, but in most cases the local economic, political, social and cultural environment will dictate the ultimate choice, as will the state of library development, level of resource-sharing consciousness among librarians.

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THE COSTS OF INTERLENDING AND DOCUMENT SUPPLY

by

B. U. Nwafor
University Librarian
University of Jos
Jos, Nigeria

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THE COSTS OF INTERLENDING AND DOCUMENT SUPPLY

ABSTRACT

The magnitude, globally, of interlending and document supply (ILL) activities, the various elements which comprise those activities and the different methods of document delivery, form the first part of the paper. The costs of ILL and the responsibility for sharing them (costs) in many communities and countries are next highlighted. For the developing countries where, paradoxically, ILL needs are felt more but ILL activities appear to be relatively low, it is recommended that they utilize the experience of other countries as they draw up a rational ILL policy which should form part of their nations' library and information policy. At the international level, IFLA which is already doing commendable work to enhance ILL, is urged to provide a platform for further discussions aimed at streamlining the costs of international ILL.

THE COSTS OF INTERLENDING AND DOCUMENT SUPPLY

B. U. Nwafor
University Librarian
University of Jos
Jos, Nigeria

At this point in the course of this seminar, almost everything we ever wanted to know about interlending and document supply (ILL) would appear to have been said. Consequently, my present task consists in no more than to put a cost on the gamut of activities which comprise ILL. That appears relatively simple.

The hard part, as it turned out, predated the seminar and it entailed the near futile efforts at accessing relevant publications to facilitate intelligent participation at the discussions here. Doubtless, my experience merely typifies that of researchers today from the Third World countries: with our libraries registering almost zero acquisitions for sometime now, the chances of locating materials in them, especially current ones, have indeed become very, very slim. For precisely this reason, I was unable to get hold of all the indexing and abstracting journals required for the preparation of the present paper. Nor was my luck any better in tracking down the journal articles and other materials located by the available indexes and abstracts. For example, I could not get hold of any copies of the following apparently relevant journals: Interlending Review; Interlending and Document Supply; NLL Review; BLL Review; or National Central Library Newsletter, and many more. Not to talk of such vital papers as Inter-library borrowing: costs and benefits (1); Interlibrary loan: costs and prospects (2); The costs of interlending activities (3); Interlibrary loan costs (4); Interlibrary costing (5); and Interlibrary lending cost analysis: UCLA Biomedical Library (6) - to name just a few.

Paradoxically, however, this shortcoming acknowledges and indeed underlines the relevance and importance of the present seminar especially to the Third World situation as well as endorses the recommendations by Line and Smith that document provision should be of high priority in the developing countries and that national acquisition and interlending systems must be planned as part of national library systems (7). Talking of Mr. Line, this speaker is of the view that had it been possible for the seminar to have hired his services full time for the four or five days of its duration, we probably would not be needing any additional papers on any aspects of ILL for he is probably the greatest living authority on the subject today.

Magnitude of ILL Globally

An idea of the volume of the ILL activity globally is considered necessary for the proper appreciation of the subject of our inquiry. In Britain, for example, the National Central Library was, by 1961, handling some 94,163 requests (8). In 1967, overseas requests alone were estimated to be 9700, a figure that spiralled to 54,300 items in 1970 and 377,000 seven years after, with most of it being for photo-copies (9). The Director of the British Lending Library Division (BLLD) estimated there were about one million ILL requests from within the UK in 1970 (10). For individual libraries, Wills found in 1972 that direct borrowing among them averaged annually 1200 items for academic libraries, 100-300 items for public libraries and 300-4000 items for special libraries (11).

In Finland, their provincial libraries processed 85,000 requests and the scientific libraries 315,000 in 1978 (12). For the Netherlands, total ILL requests handled in 1979 were 725,000 (13).

On the other side of the Atlantic, the famous Palmour survey of ILL activity in U.S. academic libraries in 1975 put the total requests at some two million items (14) while for twelve state-assisted university libraries in Ohio in 1969-70, 7126 items were processed (15). Only two years ago, Lunau stated that the National Library of Canada loaned 41,044 items on ILL whereas for the Canadian Institute for Scientific and Technical Information (CISTI) the figure stood at 204,130 items (16).

In the country reports given by participants, the extent of ILL activities in our various nations had been underscored. Wijasuriya and Bacha were probably speaking for us all from the developing countries when they characterized the ILL activities in southeast Asia as being of low volume adding further that many requests were often sent overseas e.g. to the British Library for satisfaction (17). In 1982, Line estimated the volume of international ILL to be about one million items adding it was growing rapidly (18).

The conclusion from the above array of figures is that the magnitude of ILL activity cannot but constitute a significant dent in the library budget. Our consideration, therefore, of its costs is both justifiable and timely especially for the developing countries where as our economies worsen and our libraries stagnate in materials acquisitions, our dependence on ILL requests for satisfying readers' needs escalates.

Assignment

In its simplest form, the interlending and document supply scenario goes like this: reader 'A' in location 'X' needs item 'B' in 'Y' location which is not available in location 'X'. Our task is to determine the cost of (i) generating the finding tools - union catalogues, union lists, data bases - for the location of needed items (ii) requesting, processing

and supplying the items, and (iii) determining responsibility for the various cost elements between the initiator of the request, the library through which the request is filed, the supplying library and various relevant library and government authorities.

Location Tools

Union catalogues (for books) and union lists (for serials) or their computerized or microformat equivalents are, as we have since learnt, the indispensable tools for locating needed materials for ILL purposes. Their compilation would invariably involve the cooperation of a number of libraries. Unlike for union lists, however, the wisdom of compiling union catalogues maintained on cards or in printed form, especially in the developing countries, has been rightly questioned by Young (19), among others. Vervliet speaks for those who would rather that union catalogues, as in Canada, should be computerized (20).

Olson, in his 1976 extensive study titled "The union catalogue: its cost versus its benefit to a network" (21) found, inter alia, that it cost more to maintain a separate union catalogue for medical libraries in six states in the U.S than to subscribe to the Library of Congress national union catalogue (about $4559 and $2439 respectively annually) and that the cost of maintaining the catalogue and searching for an ILL request averaged $1.90. To put together, ab initio, and maintain a union catalogue would embrace the following cost elements: that of generating, mailing, handling and filing an extra set of catalogue cards for each item in the collections of the participating libraries in a network and subsequently perhaps printing and distributing the catalogue to the member libraries. Against the background of the double/digit inflation in most developing nations, the cost today of maintaining a union catalogue for their libraries must be very considerable.

Union lists, on the other hand, are relatively cheaper to produce. The list of serials of a number of Nigerian university libraries, in printed form but originally computer-generated about three years ago, cost ₦500 (about $US 500 then or ₦4,000 today) a volume.

While the accent is increasingly on computerized union catalogues which invariably form but a sub-system of a wider network, e.g. the Online Computer Library Center (OCLC), this speaker regrets inability to come by any quantified cost of such a sub-system. It seems, however, right to speculate that since it is an offshoot of a bibliographic network, its cost would be much less than if the entire system were to have been designed for ILL only. In parenthesis, we should record that computerized union catalogues and lists are conspicuous in the developing countries by their absence.

Charging for ILL Requests and Document Delivery

Allen's findings in a 1984 survey were that all (university) libraries provide ILL services and charge a fee usually for photocopying and postal expenses (22). One hundred years earlier, soon after Austria became the first country to officially decide to loan materials to other countries, the principle of letting the lending library pay the postage one way and the borrowing library pay the return was introduced (23). But this was subsequently modified so that all expenses became paid by the borrower. While we shall be returning to the issue of sharing ILL expenses, for now we should attempt to identify the nature and extent of such costs.

As preface, Wainwright warns about "the complexities of real costing" (24) while Lester indicates that amongst the elements for consideration would be staff time, stationery, postage, telecommunications and computer time and in some cases, service charges (25). We shall now,

for illustration purposes, take a random look at the charges which various libraries have made for the ILL services they have provided or failed to provide.

Writing on the "unit costs of interlending and photocopies at a regional medical library", Spencer in 1971, found that the lender's unit costs per request received were $1.526 for originals and $1.534 for photocopies and that the corresponding unit costs for filled requests were $1.932 and $1.763 (26). About the same time Schmidt and Shaffer calculated that filling each request excluding photocopies, cost approximately $2.44 and required 0.514 man hours, amongst Ohio State-assisted university libraries (27). In their "study of the characteristics, costs and magnitude of interlibrary loans in academic libraries" in the U.S., Palmour and associates (28) came to the conclusion that lending costs were $2.12 and $4.67 for unfilled and filled requests while noting that there were wide variations among the surveyed libraries. These were brought about by factors such as the proportion of professional staff involved in the interlending activity and the library's degree of centralization as well as efficiency. However costs were not found to correlate with the collection size of the libraries in question unlike with their geographical location.

Braude and Holt carried out a cost-performance analysis of a TWX-mediated (teleprinter) interlibrary loans and found as follows: that they were more expensive than mail-mediated loans; that for each TWX ILL requests filled, the cost was $2.182 as against $0.214 for mail-mediated one; and, that for the total TWX ILL requests, filled and unfilled, the average cost was $1.659 (29). At the Penn State University where most of the campuses were linked by a telefacsimile network, a monthly average of 126 pages were said to be transmitted in the first six months of the project in 1969 at an average cost of $12.28 per page (30).

Given the improvements in fax technology since then, the transmission cost per page is expected to be cheaper now as, in fact, has since been confirmed by Bradbury (30a). The European satellite document delivery project, Apollo, according to him, aims at achieving an overall cost of about $U.S 1.00 per page transmitted. On the other hand, Nance, Wickham and Duggan have stated that the computerized processing costs per ILL transaction, neglecting input preparation, totalled as little as $.05. (31) Here a transaction is defined as the transmittal of a message from one library to another. At Oklahoma University, a decade or so later, Herstand (32) reported that the unit costs of ILL borrowing transactions stood at $4.98 compared to Palmour's previous automated study of $7.61 while a filled lending transaction cost $5.45 to Palmour's $4.67; unfilled transaction costs were correspondingly $5.40 and $2.12.

On the specific issue of whether to telex requests or mail them, Wills affirmed it was cheaper to telex (at 4.2 pence a piece) than to mail a form (at 5.2 pence) (33). However, the study by Lunau (34) showed that while the telex was the most commonly used communication device in Canada in 1982/3 and was responsible for 56% of all requests received at the National Library of Canada, in 1987, it accounted for only 2% of the requests while electronic mail shot up at the same time from 6.5% in 1982/3 to 64.5%.

To return to costs, the Interloan Committee of the Association of Research Libraries (35) found in a 1977 survey that (a) of their few members that charged fees for ILL requests, the figures varied from $3-8, other than for photocopies (b) Princeton charged its out-of-state borrowers $5 (the equivalent of the subsidy it received for in-state borrowers) (c) Cincinnati and Hamilton County Library charged $3 per filled request and $2.50 for an unfilled one, and (d) No academic

library charged for unfilled requests.

What would have been evident from the above figures is the confirmation of Palmour's earlier statement: "there were wide variations among the surveyed libraries". This variation probably accounts for the claim by some major libraries to be spending as high as from $50,000 to $100,000 per annum more on ILL than they get out through borrowing (36).

It would have struck us that none of the cost data above came from the developing countries. The author regrets inability to come by such statistical information and presumes it was not previously maintained. This situation needs redressing. Still, given the postal and telecommunications infrastructural constraints of the developing countries, their low level technology, their depressed economies and subsequent mounting inflation and the increasing dependence of their libraries on external sources for satisfying their readers' needs, and using as our base figure Herstand's filled lending transaction cost of $5.45, (or approximately ₦48.00) there can be no doubt that the ILL unit costs in our libraries would add up to a very sizeable percentage of the library budget. An index to that cost can best be gleaned from the price, beginning May this year, of the ILL coupons of the British Lending Library which Third World libraries extensively patronize. A book of twenty pages or coupons costs ₦1058 or ₦53 per coupon with one coupon fetching a maximum of ten pages of photocopy. The commercial rate for the latter in Nigeria currently would be less than ₦5! Indeed the subscription rate to semi-annual Nigerian Libraries of which Vol.22 Nos. 1 & 2, 1986 (125 pages) was published last March remains at ₦20 per issue. But to return to the subject of the relative cost of ILL to our libraries, it would be instructive to note that were my Library to use all of its materials vote of ₦270,000 (for 1987/88) to obtain copies of out-of-print books of roughly 200 pages each from the BLLD, the total budget can pay for no more than 270 such books! BLLD photocopy request costs must, however, be related to this other fact that as against 5.5 days in 1974, it took 8.9 days in 1980 (37) and probably longer still today for overseas requests to reach the BLLD.

Sharing the ILL Burden

Our interest here will be to determine responsibility for the shouldering of ILL costs. When Maurice Line stated not too long ago that any self-respecting interlending system should be self-financing, that is, it should be designed so that the supplying library recover the costs incurred and that the requesting library has to pay (38), he was in a way repeating the position of French libraries in 1933, as endorsed by IFLA, that ILL charges should be paid by the borrowing library. In spite of this arrangement appearing to ensure equity and fairness between the borrowing and lending libraries, there still remain one or two extant issues. First, what should be the exact cost to be paid by the borrowing library and how would it be realistically calculated? Should service charges, for instance, be paid? Is it possible or indeed desirable to have an internationally, regionally or nationally agreed figures worked out? Assuming the above is possible and in the absence of a union catalogue, how could it be ensured that the libraries with large collections do not get unduly innundated with ILL requests where such requests could equally have been forwarded to and satisfied by smaller libraries so as to distribute the burden? Answers to these questions are perhaps best left to the seminar participants to figure out. Nor is this all for the question of who exactly should pick up the ILL transaction bill is yet to be resolved. Should it be the reader who initiated the request or the library arranging to obtain it on his behalf? May be this is the time to recall once again the 1977 survey carried for the Association of Research Libraries in which it was discovered that over 50% of the 105 libraries polled were against charging fees for ILL services either for philosophical reasons or because theirs was a public institution (39). This leads us to the consideration of the issue of propriety, legitimacy or otherwise of publicly-funded libraries charging

fees for ILL services. In a report by the Working Party set up by the Public Libraries Section of IFLA, the recommendations were that (i) The concept of public service freely available for the borrowing and consulting of books, including the assistant by librarians be affirmed, and (ii) Charges for computerized information retrieval should only be passed on to the user where added value services are provided at the express wish of the client (40).

The situation in Britain is considered instructive. In an article "Charges to public library readers for inter-library loans" (41) excerpts from the 1964 Public Library Act were quoted to underline the extent of the responsibility of the reader to pay for an ILL service. It was stated, for example, that borrowing from another library in response to a reader's request was part of the ordinary service to which the reader was entitled and therefore, no charge was permissible. However, Section 8(5) of the Act permitted a charge if particular facilities "go beyond those ordinarily provided by the Authority as part of the library service". It continued, "Libraries can only charge for (photo) copies if these are requested by the borrower for his own retention".

The arrangement whereby an individual is made to pay for an ILL service would seem to be predicated on the assumption that the desired item is for the well being of the person rather than that, ultimately, of the society of which he is part. Seen from the latter perspective, ILL costs should perhaps be met by society through one of its agencies rather than the individual initiator of a request. May be this touches on different governmental systems. Be that as it may, the provision by Colorado State Libraries in a programme code-named COLONET-PRL (Colorado Library Network-Payment for Lending) of the sum of $114,000 in 1977 to be used to reimburse libraries for their inter-loan activities is worthy of emulation - payment of $2 per item loaned was made to all system

members eligible for compensation (42). In like manner, it has been stated that two-thirds of the members of the Association of Research Libraries received subsidies for their ILL operations either from the state or some other sources (43). Furthermore, the ILL transport scheme undertaken by Ontario Universities and administered by the Ontario Council of University Libraries was wholly financed by the Committee of Presidents of Universities of Ontario (44).

Another aspect of ILL costs for our consideration is the mode and procedure of payment for international transactions. Tvetaras (45) saw the putting into place of a "clearing house arrangement" as a possible solution. Indeed it would seem as if the framework for or rather elements of this clearing house are already in existence if we decide to borrow the coupon concept for ILL requests currently in use at the British Library and in addition use the Unesco coupons as the unit of currency for settling ILL bills. IFLA is in an eminent position to provide the platform for a conclusive international action on this subject. Already its actions which had, amongst other things, produced relevant forms for ILL transactions, are commended.

Equally commendable are the actions of some international organisations e.g. World Health Organisation (WHO) which are known to have provided needed ILL materials, gratis, to requesting libraries from the developing countries and, may be, elsewhere. If such services could be provided in other disciplines beyond medicine, the lot of the Third World libraries, especially during these days of their economic structural adjustment programmes, would be greatly improved. It is not known whether the WHO get refunds for their "free services" ultimately through the annual subscriptions of its members for the upkeep of that inter-governmental organisation, but even if it does, its present arrangement remains a model to be copied for the provision of ILL in other disciplines.

Finally, we are reminded that the title of this paper is the cost of interlending and document supply and all along we have been attempting to quantify that cost and assign responsibility for its payment - from the perspectives of the provider and receiver of the ILL service and even society at large. In all of this, the focus has been on the costs of the central and ancillary services provided. But perhaps we should consider the cost from the perspective of the effect of the non-supply or non-availability of the needed item or information. Against this background, the question is no longer what is the cost of ILL but rather the cost to an individual, organisation, community or country of lack of access to information, the result of which may be disease, ignorance, human misery, underdevelopment and so on? It simply boggles the mind to try to quantify this.

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A NATIONAL LIBRARY AS A CENTER FOR DOCUMENT SUPPLY AND INTERLIBRARY LOAN IN A DEVELOPING COUNTRY

by

Maria Alice Barroso

Biblioteca Nacional
Rio de Janeiro, Brazil

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A NATIONAL LIBRARY AS A CENTER FOR DOCUMENT SUPPLY AND INTERLIBRARY LOAN IN A DEVELOPING COUNTRY

Maria Alice Barroso

Problems, Difficulties and Solutions

I have been requested to prepare a paper for this Pre-Session that might deal with the problems, difficulties and solutions in the area of Interlibrary Loan and Document Supply. I was further requested to avoid specific mention of Brazil - my country of origin - as all the rest of the members will be obviously speaking about their own countries, which would present much resemblance to the problems that I would deal with.

Since it is extremely difficult for me to speak about any country other than my own - I should mention at this point that my nation is continental in size and also has a huge population - and because I recognize that the problems and difficulties faced by Brazil are very much the same as those faced by other underdeveloped countries, I will simply pretend not to be dealing with the Brazil we Brazilians know and , instead, will deal with problems, difficulties and potential solutions that have everything in common with Brazil except the name.

I recognize that this paper, however modest it may be, could be much better had IFLA granted me the time required for the necessary research - and the work involved does have to be very detailed and minute - in relation to the area of interlibrary loan and document supply in developing countries.

Why then did I accept this invitation, with less than two months to prepare this paper, a task which I knew for certain beforehand was almost impossible in such relatively short time?

Can Paris be worth the risk of one not giving a performance in line with expectations? Can this be the greatest temptation for a librarian from the 3rd World? "Paris is worth a Mass", as the great Brazilian writer Machado de Assis put it. However, I do not wish that my acceptance be judged in such an off-handed manner.

I accepted the invitation because this was the opportunity - which is always very rare for us, who are referred to as the developing nations, which is nothing but a euphemism for avoiding having to say that we are underdeveloped nations - this is the opportunity, I repeat, for us to jointly prepare a project that will involve a National Library as a center for document supply and interlibrary loan.

Let us once again give to our abandoned National Libraries (abandoned by the underdeveloped governments of our likewise underdeveloped countries) the authority which they had in the past, so that they can provide valuable services in the area of information - information which is a right of everybody - in the present.

I realize that the survey of the problems and difficulties which we, people of the 3rd World, are all too well aware of and have to bear with, will only be reasonably improved and brought up to date at the end of this pre-session.

We consider that the decentralized legal deposit collecting project, which has also been included in the bulk of this paper, is closely related to document supply and is, on the other hand, a sound basis for the "interlibrary loan".

Bibliographic Access for Interlending and Resource Sharing

Problems and Difficulties

- Qualitative and quantitative unsuitability of the libraries, arising from the lack of a clearly defined cultural policy aimed at developing centers of information. Such difficulties are aggravated by the shortness of financial means which inhibits any isolated attempt to implement programs involving library loan and document supply.
- Non-existence of any effective integrative action on the part of these libraries, leading to a lack of knowledge of their collections, they are largely based on the whims of their donators, leftover inventories from publishing houses and booksellers.
- Absence of formulation and maintenance of a union catalog which would offer speedy location of works within a streamlined resource structure.
- Library materials are usually acquired through gifts, legal deposit (with startling defects), complimentary copies, exchanges, membership and purchase.
- The most important factor in the acquisition system (the library user) is frequently neglected. Thus, the basic function of the library - matching the information needs of users with the information contents of documents - seldom occurs.

- The size of the potential user population is restricted by a high level of illiteracy among the people, and its capacity to make effective use of libraries is limited by a low level of education.

In order to solve some of the problems listed above, we suggest:

- Creation of union catalogs for retrieval of the collections available in the country, and which would also contribute to the expansion of its exchange capacity of information, even to the point of developing planned acquisition programs.
- Maintenance of a national union catalog of works published in the country, under the responsibility of the National Library (decentralized legal deposit collecting plus centralized processing results in costs saving).
- At the heart of the subject of resource sharing, it is important to create cooperative attitudes among librarians themselves (since the ultimate success of all library resource sharing activities depend, in the final analysis, on the willingness of librarians to cooperate).
- Creation of specialized documentation centers to produce the union catalogs of foreign works.
- A survey of library resources of the nation, in order to gather information to be used in implementing a cooperative acquisition scheme.
- The National Library will serve as a nerve center in interlibrary loan. Even though, there will be an option of direct contact between borrowing and lending libraries.

For statistical purposes, every transaction should be centrally reported. This is also a convenient device for monitoring resources.

- Through the National Bibliography, the National Library will provide cataloguing and classifying services in order to help other libraries carry out their responsibilities to their users.

  There is a great need for strong central control and monitoring to ensure that libraries are really fulfilling their assigned tasks.
- Attention should be given in making compatible formats for the already-automated institutions.
- Systems should be designed to take account and advantage of modern communications systems, requests, telex, telefacsimile and computer transmission.
- The disparity between libraries in terms of level of technological development results in the need for a two-folded adjustement:
  1. adaptation of the relationship between the libraries participating in the union catalog;
  2. adaptation of the product to the real and potential users (microfiche, diskette, CD-ROM, on-line access, printers, etc.)

Resource Collections and Document Supply Centers

It is important to promote a survival in the libraries, to renew and update their information bases constantly. The local libraries should be able to renew their bookstocks over a 10-12 year period. The public library should share its information function with the school library.

As we know, in present days computer-based information storage and retrieval systems have the ability to process information as we never even dreamed before.

But what we may question now is how the National Library, which has the function of preserving its documents, can increase its capacity of supplying these documents upon the requests of other libraries. First of all, we must recognize that uniformity and consistency in a large library system can be achieved only through centralized processing. In a centralized processing system, all book selection tools are available at one place and the units do not need to subscribe them.

In spite of these obvious advantages, the developing countries have not resorted to centralized processing to the extent to which their interest demands. Perhaps the developing countries do not have large library systems and the isolated libraries are too proud of their autonomy and refuse to join the processing center.

The National Library should be able to integrate its internal operations with its external units, using a second collection of its documents in paper form or on microfilm to satisfy the long-distance requests.

National Bibliography can serve as a useful tool for purposes of acquisition, classification and cataloguing of books by other libraries.

Regional centers with the role of supplying documents should be created to work in conjuction with the National Library.

Through joint-ventures with publishers, the National Library could publish facsimile copies of its oldest and rarest books.

Organizing a National Interlending Center for Interlibrary Loan and Document Supply

We detail in this part a small project placing the National Library as a center of interlibrary loan. Apart from cataloguing and classifying, other activities of the center could be as follows:

- "In-loco" search could be highly selective (which does not frequently occur);
- The National Library could be the national focus for remote supply through photocopies and facsimile reproductions or microfilming of its rare books;
- The National Bibliography should be accessible on line through database hosts;
- Procedures should be as simplified and standardized as possible. For example, self-adressed labels can be sent with requests or made part of a standard request form. It is clearly simpler and easier for both requesting and supplying libraries if standard procedures are used throughout the country.[1]
- Where the system is automated, receiving print-out or COM catalogues, updated periodically, can be carried out for selected services points. Obtaining print-out or COM catalogues of material on special subjects held within the area covered by the unit is also feasible;
- The National Library could also serve, in its role as interlibrary loan center, as a statistical source in the library science area.

National Model [2]

In choosing one model for a National Library in underdeveloped countries, we have to deal with the important subject of legal deposit. What we question about is if it can be possible to National Libraries (which have as one of its main characteristics of being the holder of all bibliographical material published in the country) if they can still maintain the traditional structure that was conceived before mass production of the books? Shouldn't they abandon their monolithic structure in the search for more flexible forms so that they can stick to their historical function - preserving culture on the basis of recognizing the essential nature of written word? One must recognize that in order to dominate the complex realities of the World of information processing (that World which does not ignore the document as a witness), we should incorporate the benefits of the technological revolution, both in terms of the operations involving contents processing of a work and the preservation the original form of the document.

Why then do we not recognize that collect activities, encompassing the nation's entire production, followed by operations for storage available within the system, should also be transformed? Above all with regard to collect it has been found that computation unparalleled on the processing problems, has not been very successful where it envolves the gathering of documents. In such an operation, in the collect, automation is then measured on a subsidiary basis, the administrative structure being superimposed thereon. This gathering network will be vastly more productive if decentralized.

Mass processing of documents is no longer much of a problem, though its physical collect can be - and quite possibly is - a bottlenecking, inhibiting and atrophying factor in a gathering system which is national in intended scope.

Two practices are common in the large automated systems, with respect to the supply of data:

- the unfolding of the receiving centers;
- the imposition to the users of standardized input forms, which makes such users compulsively its record-keeping source.

In many National Libraries or other centers of document supply, records generation have involved a single collect point, in spite of the bibliographic proliferation throughout almost the entire country, which becomes a risk to the effectiveness of the system.

It is worth emphasizing that, among the possible flaws in the structure of a National Library which has not decentralized its legal deposit collect, are the sharp loss in collect and the illegal withholdment of the document to the greater part of the population. Such excessive concentration has a disintegrating factor, both in terms of the institution expansion and for the creativity of its services. Its value cannot be separated from the demand, with yields proportional to the action employed, which certainly would favour a vast number of users.

The register of a bibliographic collection does not generate a corresponding mobilization of interest in the cultural asset. The iniciatives for knowledge of production fade away and new approaches to the problem should rest on new bases, adjusting the horizons to the context.)x

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Our conclusion is that production should be shared, integrating other collection centers in alternating come-and-go flows, since those who produce should enjoy the possibility of becoming rich with knowledge, at least generated by their own production.

This is the right to self-distribution of information.

Our proposal is that: the collector centers which would be geographically well distributed, would begin collecting the legal deposit for the National Library, by means of at least two copies of the same title: the first would go towards formation of the regional collection and the second would be forwarded to the National Library, to the whole national printed product.

In the centralization of collect as in many National Libraries, the input and consumption has been reduced in relation to what is produced and is not caught. Rarefied collect in the present compromises the future. We have to reverse the necessity and the availability of information.

The innovator aspect is in establishing the balance of the National Library's radius of action, by means of in-depth exploration of the regional potential. The goal is to narrow the relationships in the production of information within a systemic complementarity. It is important to develop as much as possible the potential of each federative unit, with the clear understanding that the diversity thereof should be respected so that the basis have greater cultural density.

In order to put the country's bibliographic control in the hands of the National Library, we must count with a legal deposit-law operating very well.

The legal deposit law should privilege not only the National Library as a collecting agency, but also those centers that will represent the National Library.

Only thus can we in fact speak of an effective interchange of content processing, as long as the physical collect of the works stop being a bottlenecking factor.

Accordingly, regional self-valuation, stimulation of interchange, the vital multiplication of gathering points, leads us to propose implementation of collecting centers. They will house regional publications and also have access to the union catalog of the National Library.

At the heart of this proposal is the direct, proportional relationship between PRODUCTION and SPREADING/PRESERVATION AND CONSUMPTION, which will lead to changes in structure, technology, communications, legal order and, mainly, mentality. The soundness of the action will be based, moreover, on the flexibility of the structure. It should include full integration of the central agency with the peripheral agencies in joint management of the working methods and standardization of the system's processes. Due consideration must be given to the interest of the segments and the requirement regarding control and security in harmony with the National Library.

International Links

According to Maurice B. Line: "Geographical proximity may prove to be a less important factor than linguistic, cultural, political or even religious affinities, though it has the advantage that it is at least permanent".

What is really needed is a national center through which both incoming and out going material requests can be channelled. The potentials for the new technology are to make library materials much more readily available. The most surprising development made possible by computerized networks is the increase in the availability of materials in small libraries. We should consider that the basic objectives of an international link to a National Library include, among others, the following:

a) to expand bibliographical techniques;

b) to meet the demand for document delivery, interlibrary loan and photocopying services;

c) to increase resource sharing and networking among information systems.

Treining for Interlending

It is important to adopt standard training for interlending procedures in requesting or lending documents, trying to use terms precisely.

Emphasis should also be placed on the fact that in the underdeveloping countries training becomes a rather difficult task and even a mistaken one, to the extent that we blindly follow the model of the developed nations.

There is such a wide gap between rich and poor nations that one is advised to adopt an entirely new, much more comp' .x, reality, mainly due to the lack of resources.

And there is a further detail that needs to be mentioned with respect to the underdeveloped countries: the absence of reliable statistical data makes it very difficult to plan any system and apply it effectively.

Statistical surveys, standardized forms and human resources training are important components in interlending policy.

Technology and Communications for Interlending and Document Supply

The developing nations, some of them rich in territorial extent but poor in terms of investiments in education and culture, frequently find themselves having to resort to extremely varied means of communication - everything from muleback mail to automated communication.

Since knowledge has no boundaries, every underdeveloped country should try to make the knowledge produced in its territory bibliographically available either by manual or computerized systems.

The development of information infrastructure in each nation is also a necessity for effective resource sharing.

In the case of a National Library with a role as center for document supply and interlibrary loan, it may be linked with other regional centers by mail, telephone, telex, and - depending on its financial resources - through a national on-line link.

Another relationship which is still not fully developed is the one between the library and the bookseller. In order to avoid duplication, booksellers may computerize their operations and offer their products to libraries, as well as the National Library. In Brazil, and in other developing countries, excellent aditional service is provided to booksellers through

the National Bibliography by the ISBN number.
We must also remember the possibility of making the center (National Library) become the wholesaler, mainly with respect to foreign library material.
As regards utilization of various formats, the Center should carry out the task of microfilming the serials of the whole country, so as to prevent their disappearance, which frequently occurs with regional serials of underdeveloped nations.
Photocopies provide a unique opportunity to have text and illustrated pages, the originals of which would never be lent, due to their intrinsic value. At the same time the priceless originals are preserved for posterity.

Costs of interlending and document supply

We have to admit that few countries can be said to have "interlending" systems. Those that do have one combine partial centralization with descentralization, that is to say, all the libraries having an equal part in interlending.
One thing that must be said, once and for all, is that the greater the demand the lower the costs must be.
Considering the difficulties that underdeveloped countries have to face in terms of their budgets, the experiences of other researchers would advise us that to begin an interlending program, one should have financial support available from a national agency.
If such a program is already established, it is common in the underdeveloped countries for the user to pay the lending library.

Perhaps the best and most convenient way of paying for international loan would be through the use of UNESCO coupons.

Interlibrary loan should be closely monitored and it is important, furthermore, to have a single channel through which most requests can be submitted.

It is also recommendable to begin with serials and recent monographs, since it is these kinds of bibliographical materials which are most preferred by users.

CONCLUSION

The underdeveloped countries have already concluded that "whatever system is planned there must be a Center".[4] In proposing the National Library to fulfill this important role, mainly in developing countries, we do so for certain reasons, which are specified below:

a) Generally they store the biggest and most varied volume of library material;

b) The National Library is usually responsible for publishing the National Bibliography, which is enough to make that library responsible for cataloguing and classifying the library material which comes to be stored through legal deposit;

c) As a result of the legal deposit law, the National Library will have a second and comprehensive collection which may fulfill requests that could not be attended by other lending libraries in the network;

d) Since planning for interlending should be undertaken as part of national library planning and, as has been pointed

out earlier, it is essential for national acquisition programs that an interlending center should be linked with, if not part of, any National Library Planning Center;

e) A strong case can also be made for links with National Bibliographic Centers, so that on-line document requesting can be more easily planned and implemented. A further function could be that of a national center where rare or valuable materials can be reproduced so that loanable copies are available. [5]

We would like to emphasize one particular aspect in regard to South America, the Continent where my country is located. The National Libraries of these nations possess extremely rich collections which are suffering the attacks of bibliophagic insects and with inadequate locations. The climatic adversity is the most ferocious enemy of the generally valuable collection. All this is chiefly due, however, to the budgetary carelessness they receive from their governments. As pointed out by Virginia Bettancourt Valverde, our dear Venezuelan colleague, the National Libraries of Latin America are houses - at times even palaces - which have become grey and sad through the years, systematically overlooked on the small cultural budgets. The governments almost never think of their collections as a written testament of the past of their nations. Even less do they realize that the

collect of the legal deposit of the present will prevent the future from not knowing the past of a people and a nation. The moment has therefore arrived to receive from the National Libraries the services which they can perform as no other library in the same nation can.

If they are already fulfilling the role of decentralized legal deposit collection - and no nation is too small to be able to ignore such decentralization - bibliographic control would already be an accomplished fact. The next step will be diffusion of the bibliographies of the various collections, in the case we cannot count with the on-line union catalogue, which would make it much easier to monitor the system.

We can expect a great deal of the "Association of National Ibero-American Libraries"[6], whose constitution was signed in Madrid, November 1988.

Ladies and gentlemen, my dear colleagues from the so called Third World: culture must no be separated from education, as some pedagogues insist on doing. Nor can science and technology be apart from culture and education.)

Beyond politics and mean feelings of power, let us fight for the right to information for our people. Above all, let us fight for better days for our countries. Thank you.

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INTERLIBRARY LOANS

AHMED FASSI FIHRI
Directeur du Centre National
de Documentation

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INTERLIBRARY LOANS

by Ahmed Fassi FIHRI
Directeur du Centre National de Documentation
Rabat, MAROC
June 1989

1-Introduction

The development of education, on one hand, and especially University education, has been impressive; research has been intensified and its sectors widened, industry and technology have been developed to a prodigious degree.
On the other hand, the services that libraries and information services are led to offer are ever growing while, at the same time, the huge flow of information and documents that are issued every year show clearly how impossible it is for any library wholly to apprehend it or even to try to acquire an exhaustive range of documents on any subject.
While already limited financial resources are growing at a slower pace than the production of information, qualified personnel is often scarce so that many libraries have been led to try and cooperate with one another on a multiform basis within structures they have had to create.
Such structures have been either systems, networks or consortia working in a cooperative and agreed system. They might also take the form of group organisations or coordinating departments trying to centralise operations.

The notion of cooperating libraries was born in Europe in the 17th century, but was only worked out much later in the second part of the 19th century in the United States and Europe, as industrial research and development were growing up and more and more documents were becoming necessary to it. In fact it only took a concrete form in the beginning of the 20th century and practically began to function widely only in the '40s.

It really began to flourish in the United States of America and in Europe (United Kingdom especially) among University libraries and some public ones, finally to extend to the rest of the world (Australia, Canada, New Zealand and Japan...)

Cooperation at first only meant interlibrary lending, but later on extended to varied activities such as :

- cooperating or coordinating efforts in the matter of buying,
- cooperating in the dealing with collections of documents, the exchange or the creating of working tools ,
- exchanging catalogues and publications,
- centralising or decentralising of storage of documents,
- training staff,
- buying, using and sharing equipment.

Interlibrary lending has long been the most usual way of cooperating and of sharing resources. However, after the second World War and, especially from 1960 onwards, it has been completely transformed.

2-Definitions

Interlibrary lending is a process which allows libraries to borrow from one another what they do not have for the needs of their respective users. According to the American 1968 interlending code for libraries :" Interlending is an arrangement through which one library's resources are made available to another for the use of one person." Copies might be used instead of the original documents.

The recognised process is more or less the following one :

1. A request is made for a document.
2. Such a document does not exist in the library.
3. The librarian makes sure of its exact bibliographical data.
4. The librarian finds out which particular library owns the document.
5. A loan form, duly completed, is sent to the library which owns the document.
6. If it is available and has not been ruled out of the lending list, the library sends it and sends a copy of the loan slip under separate cover to the borrowing library.
7. As soon as the document arrives the librarian informs the person who asked for it and indicates when it should be returned.
8. As soon as the document is returned to the borrowing library, the librarian sends it back and sends the loan slip back too under separate cover.

With the advent of new technologies (telex, computer terminals, fax machines, networks for data transmission,...) changes have affected the way and the speed with which the request as well as the document can be transmitted (copies are usually sent instead of the original.)

The process usually is quite simple and most tasks can be accomplished by deputy librarians.
However a qualified librarian is needed to :

- find out from the would be user exactly what his need is and make sure that such a document and no other will do in the precise case,
- make sure of the bibliographical data and of the lack of the document in the library.

Such standard practices which have obtained for decades among librarians throughout the developed world are now evolving and becoming the norm everywhere in the world owing to new information technologies and especially the implementing of telematic networks combining computers and optical and digital techniques which help transmit information and documents at very high speeds of delivery within one country or even between countries quite distant from one another.

Success, generally speaking, depends on the following elements :

- the size and type of the borrowing library,
- the distance from the lending library,
- the academic level of the borrower as well as the sector of his research,
- the kind of document required (type, language, place and date of publication...),
- the accurateness of the bibliographical data,
- the availability of bibliographies, of catalogues, of data bases and various research tools in the borrowing library,
- the possibility for that library of using collective catalogues, bibliographical centres and sundry directories to discover the libraries likely to posess the document.

3-History of interlibrary lending

Interlibrary loans must probably be as old as libraries. Some sources date them back to the 8th century, others say only that they were current practice in some libraries in the 17th century.

As an organised and codified practice it dates back to the 19th century, when a call from Samuel Sweet Green was published in the first issue of the Library Journal in September 1876.
However it was only in the beginning of the 20th century that it began to be more common in the United States and Great Britain. It really began in the United Kingdom in 1907.
Through a series of articles, symposia, meetings and professional workshops it was slowly codified.
The first lending code, proposed in 1916, was adopted in 1919 in the USA and re-examined in 1926, in ALA meetings, through which it was recommended that the practice be extended geographically and that clearinghouses be created as well as collective catalogues
A new code was to be published in 1940; it examined costs and tried to devote itself to "help research so as to move back the frontiers of science."
As rather few libraries had been adhering to the previous code (owing to the restrictions it entailed), a new code, promoting the use of interlibrary loans for wider categories of readers and including in the loans a larger range of documents, was published in 1952.
A standard loan form and a uniform scheme to participate in the costs were adopted then. In 1968 a fourth code was published; then, in 1970, it was followed by an " interlibrary loan handbook " explaining the code and giving instructions which concerned new technologies and national and international interlibrary lending.
The code is quite insistent that interlibrary loans are essential to research; it extends the notion of research worker to wider academic levels and to various categories of readers and asserts that it is a vital and essential part

of the services a library can and should provice.

Through a series of acts passed in 1956, 1965 and 1966, the Federal administration of the United States in charge of libraries and Higher Education has been supporting and promoting cooperation between libraries and interlibrary lending with the aid of grants.

4-Interlibrary loan requirements

To help promote interlibrary loans and facilitate the necessary checking of any bibliographical information which has to precede any loan, it is necessary, on a cooperative or coordinated basis, to acquire a number of bibliographical tools or services integrating costs, means of communication and new technologies (already in use or foreseably to be implemented).

4-1 Bibliographical tools and services

4-1-1.Collective catalogues of books or periodicals and subject bibliographies will give standard bibliographical descriptions allowing the librarian to discover and locate documents; they form a data source which can be used in multiple ways.
The first collective catalogues were established in Great Britain within the first decade of this century and in the United States between 1920 and 1930, then were developed until the sixties.
The way they were produced (either in a centralised or decentralised system) and the structure of traditional library networks were an image of the computer networks that were to be developed later on.
They generally consisted of a regrouping of the various catalogues of the libraries which were members of the network or by the centralising of the bibliographical data of every document belonging to each of the libraries in one library or in a documentation centre serving as a coordinating centre.
Such catalogues have to be very complete, always up to date and available in every library participating in the network.
As governments try to encourage those schemes, such tools are more and more easily available for everyday documents as well as for old or rare documents or for manuscripts.
Bibliographical checking, standardising of cataloguing rules and cooperative cataloguing on a regional, national and international scale are tending to give such tools a larger coverage of available collections within the world libraries.
Computers and the development of catalogues of the MARC type contribute to shorten delays between the publishing of any document and its appearing on catalogues and delays between searching and retrieving documents.

4-1-2. Reference services, data bases and storage centres with a central catalogue or a shared catalogue allow one to define the documentary production of a country or of a region and the flux of documents coming in from foreign countries, to search for relevant documents and discover them so that they can be borrowed.
Data bases with their hosts are like actors assuming an ever growing role in the exchanges of information and documents within libraries, on one

hand, and between libraries and big storage centres on the other.

4-1-3. Guiding services are usually implemented by networks, consortia or library coordinating centres. They work around a whole set of directories, guides and catalogues (hand or computer made) receive the requests for documents and direct them towards the libraries or storage centres where the documents can be found.

4-2. Communication channels

A lending scheme between far distant libraries cannot work without resorting to the following communication channels :

- postal mail , the oldest way of mutually transmitting requests or documents. It is still largely in use. New channels, however, faster and surer are more and more often used;
- direct mail (through somebody specially in charge of such deliveries or through approved transport services) is sometimes used to transmit requests and documents;
- telephone, used in emergencies to transmit requests, has the drawback of being expensive and not allowing for the request to be traced afterwards for lack of a completed form;
- teletypes and terminals allow for the instantaneous and more secure transmitting of requests and bibliographical data . With printers they can transmit a document which has been stored within their memory;
- facsimile machines allow for the transmitting of the request and the document within a relatively short space of time.

4-3. Organisational frame

In order to promote interlibrary lending and overcome problems that might hinder its success libraries are led to sign agreements and/or to organise themselves into consortia or groups ruled by certain regulations to manage their common activities and the sharing of resources, to define respective tasks and responsibilities and organise a scheme for sharing and wiping out costs.

4-3-1. Library networks

Mostly resulting from agreements and understandings to share resources, networks might be of a geographical or topical nature or might combine both types. Some are pools of libraries of the same type, often university or college libraries so that they can share in potential resources or in the rich book collections owned by some Universities.
Structured networks help reduce lending costs and average waiting time for answering requests. New technologies help reduce these still more to much more reasonable proportions.

Various forms of cooperation are possible :

- cooperation in buying is a must. No library can lay claim to being complete or self sufficient to answer the needs of its users, owing to the huge flow of documents produced in the various areas of knowledge, to ever growing prices, to difficulties in the technical processing of documents and their being made available to users within reasonable time limits, to difficulties in storing them and especially owing to limited financial resources.

European or American libraries have quite early begun some cooperation in

in buying projects to prevent any of them acquiring the same documents and help devote more resources to the strenghtening of the collections most in demand or in use according to their particular concerns. Interlibrary lending allow for the supply of occasional needs.

- Cooperation, as it concerns storage, will only affect such documents which are rarely used or duplicate documents so that shelf space can be saved for the libraries' own needs. A cooperative storage centre will be concerned with lending documents in stock to members of the cooperative network.
- Cooperation for catalogues is targeted :
  - to prevent useless duplicate efforts
  - to spare staff who can work in other ways, such as establish standard cataloguing procedures and bibliographical descriptions, classification indices and prepare collective catalogues.

Cooperative or centralised catalogues can be produced either by one of the member libraries, a centre established by them, or by a national library or a publishers organisation.
Exchanges of publications can take place within a whole network or some only of the libraries belonging to it. They concern documents published only in small numbers or distributed on a restricted basis, official publications, duplicate documents or those issued by the libraries themselves.

- Libraries can cooperate in the matter of processing or reproducing documents and share in various technical equipment in the case of the less well endowed libraries.
- An exchange of expertise, training, or retraining, as the need might be, in tasks loosely or closely connected with interlibrary lending.

4-3-2. Costs and charges
Those have always constituted a tricky issue and a big problem. The proposed answers have all been controversial.
The argument has always been : who should pay for the charges incurred once information has been obtained ? Should it be the government, the organisations or individual people ? And what costs should be charged and in what way ?
Costs are not only made of communication charges, which can vary according to the way in which information is conveyed or to the speed of transmitting it or the kind of equipment which has been used. One should take stock of such costs, think of ways to absorb them and, if possible, try to find subsidies.

4-3-3. Copyright problems have emerged with the intensive practice of interlibrary lending. Within highly organised and performing networks and especially where copying and transmitting systems have been used to excess, the problems have been because no permission to reproduce their writings was asked from authors.
Breaches of the law on copyright are committed almost everyday and proceedings against lending libraries very often taken.
Some new regulations conciliating interlibrary lending, documents transmitting as well as protecting authors' copyrights have been proposed, yet are

constantly outmoded as new technologies are evolving.

4-3-4. Library status and membership problems

Clashes emerge between libraries which are members of various organisations (public, private, borough libraries,...)
Such situations require the setting up of an adequate legal frame as an incentive to a better cooperation.

4-3-5. Communication

Since more than two decades the role played by communication channels and data transmission has become decisive for the circulation and exchange of information; it is necessary to implement structures and some adequate legal framework to ensure that information and documents can be sent in a more suitable way and at lesser costs from one library to another.

5 - THE TECHNOLOGICAL STAKES

One of the more important issues for interlibrary lending is the waiting period that elapses for the reader between formulating a request and receiving the document which has been asked for. Mail is very often too slow. New technologies have already allowed for a shortening of such waiting periods from several weeks to only fractions of an hour:

- Computers of various sizes and telematics networks make it easier to process, store, retrieve and transmit the bibliographical data of documents in larger batches and very much faster.
Terminals and microcomputers, connected to sources of bibliographical data, make the retrieval of any document and the transmitting of the request for it almost immediate and are also able to send the information contained in the document if it has been stored in primary data banks.

- Facsimile machines, which were experimented in the beginning of the sixties, have been much improved in performance and fiability while their price was coming down. They are more and more often used in libraries and information services. While they allow for the transmitting of any request and document within a very short time, they, however, tend to be a very heavy strain on the user's and indeed on the library's limited resources, as costs from their acquisition and maintenance are piling up.

- CD-ROMs and optical digital disks will allow readers a free use, not only of catalogues, but also of wholly or partly available other libraries' collections. With laser techniques and storage capacities are evolving very quickly.

- Networks for transmitting data by batches have stimulated the exchange of information through computers between libraries and information services and have given continental and even transcontinental dimensions to information and libraries networks and to cooperation between libraries.

- Satellite communication will accelerate such a phenomenon. Plans for transmitting documents (ARTEMIS, ADONIS, TRANSDOC,...) including laser techniques, satellite communication , hosts to data bases and publishers have been launched at the behest of the Library of Congress, the British Library, the CNRS/INIST, CEE, ...

Interlibrary lending has already been integrated into a larger landscape, cooperation among libraries, which is including various actors, means and sundry technologies needed for producing, processing, storing and circulating information.

Created to surmount a lot of constraints and difficulties, interlibrary lending yet has become a cause of ever growing charges which are very difficult to bear and is supporting a process tending to transform it into an area of activities engendering profits within the information industries.

6- INTERNATIONAL INTERLIBRARY LENDING

6-1. International situation

Various national and international actors are playing a role :

- FID in the case of international information networks,
- IFLA which is the most active, through the Universal Availability of Publications (UAP),
- UNESCO, through PGI (General information Programme),
- ECC, which launches special projects for the storing and supplying of documents,
- ICSU (International Council of Scientific Unions),
- the British Library Document Supply Centre,
- the French INRS under the responsibility of INIST and CNRS,...

International interlibrary lending dates back to the 17th century; some European libraries have practised it through diplomatic channels. But it became more common only at the end of the 19th and in the beginning of the 20th century, when the first regulations for it were being worked out.
It expanded among world libraries owing to the influence of :

- the International Institute of Bibliography
- the Institute for Intelelctual Cooperation
- the IFLA/FIAB.

However its success was more especially due to the efforts made in each country about codification of interlibrary lending, bibliographical control, implementing bibliographical tools and creating library networks.
The United States, Great Britain, Germany, Sweden and Denmark libraries have been in the van of the movement, as they very early implemented the structures and the organisational regulations which served as a framework for a very advanced cooperation.

Such cooperation took the form of local, regional and/or national networks of College, University, public or specialised libraries or centres around national libraries.

The British model is the one one likes to refer to with its regional networks headed, on a national level, by the prestigious British Library and its British Library Document Centre integrating college and university libraries and having at its disposal collective catalogues as well as one of the most complete national bibliographies in the world.
France has a network of big libraries endowed with rich collections and centered around the Bibliothèque Nationale acting as a centralising institution. However the French model has suffered from such a centralisction as well as from a belated computerisation. The Bibliothèque Nationale is a centre for international and national interlibrary lending. The INIST (Institut National de l'Information Scientifique et Technique) with the CNRS has retained for itself a bigger and more dynamic role and is concerned with the availability of primary documents within France and in the world.

6-2. IN THE MIDDLE EAST AND NORTH AFRICA

Libraries were born at the same time as writing appeared in the Egyptian, Assyrian, Babylonian countries as well as among the Greeks who had settled in North Africa, especially in Pergamon and Alexandria (Ptolemies).

Arabs and Muslims who inherited a complex set of cultures and civilisations, have created, equiped and provided scholarly staff (librarian, copyists, translators...) for some big libraries famous in the whole world as those in Baghdad (Beit al hikma), Cairo (Dar al hikma), Cordoba, Seville, Fès, Shiraz, Istambul...

Copyists, engaged as job-workers settled down to realise, on order, clear copies true to the original documents deposited in the libraries of the Mosque, the prince, the khalif, or in the private libraries of scholars or in bookshops (Koutoubiyyine) to send them to the far distant libraries.

Such a production became so important that bibliographers had to settle down to the task of making inventories of it and producing catalogues. Ibn An-nadim made the first catalogue (Al fihrist) of the existing Arab documents which can really be called a catalogue.

Books were among the presents offered to Khalifs by vassal princes to be put in the imperial mosque libraries, medersa libraries (high schools). Books also were exchanged as gifts between Muslim princes and sultans and between them and christian princes. One remembers how the great translators of Beit al hikma worked from copies most of which had been obtained from the Byzantine emperors by Khalifs Ar-rachid and Al-Mamoun. On several occasions, after the fall of arabo-muslim Andalusia, the princes and sovereigns of Muslim Occident and especially of Morocco, whenever they were negotiating with Spain were insisting that the arab manuscripts included in the Escorial collections be returned to them.
The work of bibliographical census, begun by Ibn Annadim will be continued

by renowned bibliographers such as Tash Cupri Zada, Haji Khalifa,...

The development of libraries which followed the "Nhaaha" (renaissance), begun in Egypt and Lebanon from the twenties, then rather slowly elsewhere, in the thirties, to become somewhat important, especially in the sixties in the North Africa and Gulf countries, Irak and Syria. An effort to implement and reinforce the existing structures is being sustained in Morocco, Tunisia, Egypt, Kuwait and Saudi Arabia. Interlibray lending in Universities is benefiting from from the special attentions of the people in charge of University libraries in Saudi Arabia, where a cooperation process has begun in the 1980's.
ALDOC, the centre for documentation and information of the Arab League, works to set up a polyvalent cooperative network for information (ARISNET) which regroups all the libraries and information centres of the League countries taking part in it.

7- IN MOROCCO

There is no national code regulating interlibrary lending. Such a practice has not been widespread. Experiences have been made, yet have remained limited or short-lived, such as those made under the aegis of the National Centre for Documentation (CND) from 1974 to 1977 between the libraries of the Ministère du Plan (Projects and Planning Ministry) and the University institutions depending from it and also the one which is still going on between the libraries of four University Institutions under the wing of the "Ecole des Sciences de l'Information" (School for Informatin Sciences), in Rabat.
Some cooperation does exist between University libraries, yet is limited to the exchange of documents. However, in most of them, access for non members is often prohibited or made nearly impossible.

The General Library and Archives (Bibliothèque Générale et Archives) acting as a national library entrusted with statutory copies of any document published in Morocco, is open to everybody and allows scientists and other readers to make use of its book collections. However it does not make loans to other Moroccan libraries, though, on request, it supplies them with photocopies of certain categories of documents.

The Centre National de Documentation collects, by the means of a compulsory kind of deposit, unpublished documents, "grey" literature and whatever is issued by institutions whose financial requirements are wholly or partly met by the government treasury. It also buys scientific or technological publications edited in Morocco and/or about Morocco but published outside the country.
All such documents are microfilmed and stored (in microfiche form) after having been duly catalogued. The bibliographical data are published in the form of bibliographical indices and stored in data bases.
The CND documents can be accessed on the spot; copies of the microfiches or paper copies can be supplied on request either on the spot or through the mail at reasonable costs.
The CND also has supplied the regional agencies of the Ministère du Plan with duplicates from parts of its collections insofar as the documents relate to their geographical areas.

The CND is a kind of centre for requests/answers, supplying references and the kind of documents it collects as well as those of which the bibliographical data are listed in the computer data bases accessed through ESA/IRS hosts and Telesystemes/Questel and through the international cooperative information systems of which it is the centre.

Through its coordinating role for the information units of the country, the Centre National de Documentation is working to implement a national information network divided into sectorial under-networks and is especially active in trying to urge a more real cooperation between libraries and information centres and to set up an interlibrary lending system.

The Association Nationale des Informatistes (National Association of computer field workers) organised a meeting with the same object in 1984 at the end of which a follow-up committee was set up with members from the University libraries. Yet it did not get any results for reasons unclear.

CONCLUSION

The success of interlibrary lending in one country or between several countries implies the following conditions :

1) a dense substructure and developed system of libraries and information centres. An interlibrary lending system cannot work when libraries do not exist or are poorly endowed;

2) some bibliographical control : countries with national bibliographies and collective catalogues (be they classical or computer made) and having at their disposal library and information services directories are capable of managing an effective and wide-ranging interlibrary lending system;

3) a process allowing for the systematic centralising of all requests in national or regional information centres.

Europe and the USA could, thanks to their advanced library networks and information centres, maintain the most effective systems which are attracting the main part of interlibrary lending transactions from the whole world.

Extending interlibrary lending would mean :

1) an organisation of libraries into cooperative networks;

2) their being equiped with computers which would be used for cataloguing and processing document collections and for managing all transactions;

3) more efforts applied to standardisation, better accounts keeping and compatibility between the existing systems;

4) a search for financial support of creative efforts and of stronger library networks;

5) a way of allowing librarians, information and documentation officers to participate in the planning and the setting up of communication networks through computers;

6) the implementing of national projects or planning policies based upon a systematic computerisation of libraries, information services and the producing of bibliographical products and services;

7) an agreement that priority be given to the computerisation of University libraries working tools;

8) the setting up of Research and Development structures for library and information sciences.

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OPEN FORUM PRESENTATION

THE IFLA OFFICE FOR INTERNATIONAL LENDING

Graham P Cornish

Research Officer

IR053253

For internal use only:

Meeting No: 62

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Estimated number of participants in the meeting:

Introduction

The IFLA Office for International Lending was established in 1975, following a suggestion made at the IFLA Conference in Liverpool in 1971, to carry out research and collect data on all aspects of international interlending. The Office occupies a unique position within IFLA as it is financed entirely by the British Library as part of its commitment to IFLA but in professional matters responds to the Interlending and Document Delivery Section Committee, although not directly under its control. In effect the Office is the research and development arm of that Committee.

The staff consists of a Director, who is also Director of the British Library Document Supply Centre and a Research Officer who spends about 50-60% of his time on IFLA work the remainder being taken up with work for the British Library, mostly on copyright law and also the interlending and legal deposit of audiovisual materials.

Basic Aims

The basic aim of the Office is to further and improve international interlending throughout the world. As international systems are only as good as the national ones of which they are built, the Office is equally interested in regional and national interlending systems.

The Work of the Office

The work of the Office falls roughly into four areas: practical assistance; workshops and conferences; research and publication.

Practical Assistance

International Interlending Form

To help those involved in international interlending the Office designs and sells an internationally approved interlending form for transmitting international requests. The form is an internationally recognised document amongst libraries. The form is sold at £7.00 for 100 forms with a reduction to £6.00 for developing countries. These charges recover the costs for printing the forms and administering the scheme. During 1988 a total of 80,800 IFLA International loan/photocopy forms were sold. Both French and German versions are available. To cater for changing demands the form is in the process of being redesigned in consultation with the Section Committee.

Guidelines for International Lending

In 1978 the Office produced International Lending: principles and giudelines for procedure. These were adopted by IFLA and have been widely published and generally adhered to. A small revision was produced in 1983 and a more radical overhaul took place and was agreed in 1987.

National Model

In 1983 the Office also produced a Model National Interlending Code. This was produced and has been widely publicised. It is intended for those countries without an organised system but where one is being established or for those who wish to look at the existing system again.

General Advice

The Office is willing to look at interlending and document supply to help analyse the problems in a specific region or country and offer advice on setting up or modifying the system.

Workshops and Conferences

The Office has taken steps in being involved in workshops to encourage and improve interlending and document supply. The first of these was conducted for the Caribbean region during the annual conference of the Association of Caribbean University Research and Institutional Libraries (ACURIL) in Martinique in May 1988. One result of this is a joint IFLA OIL/ACURIL survey of interlending traffic in the region which is now in progress. It is hoped that other opportunities will arise for such workshops in the future.

A significant event in the work of the Office was the First Interlending and Document Supply International Conference held in London in November 1988. The conference attracted over 230 delegates from 28 countries and a substantial number of valuable papers were presented. The Conference was organised jointly by the Office and the journal Interlending and Document Supply. The Office was also responsible for one of the papers (on copyright) and will publish the proceedings later this year. Planning for the Second Conference is now in hand and this will be held in London in November 1990. The Office was, of course, one of the major participants in the pre-Conference Seminar on document supply in the Third World, and will be presenting a paper on charging for international loans.

The Office was invited to present a paper on its work to the Norwegian Interlending Conference, held in Oslo in February which gave wider publicity to its work. The Office has also received an invitation to run a workshop in Kenya.

It has been suggested that an "exchange of experience" should be organised for those offering and using high-speed, high-quality (and therefore high-price!) document delivery services. This is being explored at the moment.

Again, suggestions for meetings, workshops for conferences will be welcome.

Publications

The Office has produced several editions of the Brief Guide to Centres of International Lending and Photocopying, the last of which appeared in 1984 with a supplement in 1985.

The questionnaire has now been sent out to prepare a 4th edition to be published in 1990. Part of the preparation of the new edition will be to persuade national libraries in developing countries to take their responsibilities under the UAP Programme seriously and cooperate to make their national output more widely available to the rest of the world.

The Research office and Director both serve on the editorial board. Interlending and Document Supply (ILDS) which provides a publishing medium for a number of papers produced by the Office although these are increasingly being published in other journals as well to make the ideas in them more widely known.

The Office produces a semi-annual bibliography of articles, books and reports on interlending and document supply and a semi-annual review of the literature, picking out certain trends and drawing attention to significant publications. Both of these are published in ILDS. A cumulative bibliography has just been published with author, subject and geographical indexes, covering 1976-1987. An address list of the national libraries in each country has also been compiled and published as National Libraries of the World: an address list. This is published free from the Office and also from the Section on National Libraries.

It was felt for some time that it would be useful to have a newsletter for the Office. Unfortunately there has been no money to produce and publish one. To overcome this the Office has now taken over editing the "Miscellany" section of ILDS and will use this to fulfil the function of a newsletter.

In 1987 the Office published, in conjunction with Unesco, a Model Handbook for Interlending and Copying. So far, over 800 copies have been distributed and Unesco is commissioning a Spanish edition and it is hoped there will also be one in French.

Other publications being prepared are paper on the current sate of copyright law in relation to document supply throughout the world, and a survey of document supply services offered by abstracting and indexing publications.

Research

The Office has carried out a number of research projects including a study of core collections of journals for a document supply centre and the constructions of union catalogues for developing countries. Some work has also been done on a common charging system for international loans, especially within Europe. A survey has also been made of specialised collections within large major collections whose existence is not generally known. The Office also collects statistics on international interlending which are analysed to study trends in international interlending. The Office also undertook a piece of research, not strictly linked to interlending, for the Section on National Libraries. This was a questionnaire to discover what role, if any, national libraries played in research and development in library and information science. The analysis of he data collected will appear in the new journal International Journal of Information and Library Research.

The Office maintains a keen interest in the development of copyright law throughout the world, especially in relation to document supply although a much broader view is taken of it. The Office is also keenly interested in the problems of charging for interlending, especially international transactions. Suggestions for topics for further study or research are again welcomed.

The Future

In a time of financial constraint it is not surprising that the future of the Office has had to be examined closely. Whilst there is a great desire to make the Office better known and become more involved in document supply issues, there is also a need to limit the financial commitment wherever possible. Consequently new activities have to be self-financing whenever practicable. The workshop in the Caribbean was paid for partly by the British Council and partly by the Library Service Trust, a UK grant-making body within the (British) Library Assocation. The Model Handbook also attracted considerable funding from Unesco. The International Conference was also a self-financing activity. The Office is anxious to find projects which can be undertaken on a cost-recovery basis or for which financial support can be found from appropriate funding agencies. Time and expertise are available but money is, as ever, more limited in supply!

The Office was established to encourage interlending and document supply throughout the world. It is there to serve the library community in the best way possible. It has available considerable resources of literature, bibliographic data and information as well as experience and expertise. It is hoped that these will be used by those who need them and the Office can play a truly international role in achieving its aims.